

# MARSHALL WORK INSTRUCTION

PS01

## REQUIREMENTS DEVELOPMENT TEAM (RDT) AND SOURCE EVALUATION BOARD (SEB) PROCESS *With Change 2 (3/5/21)*

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## DOCUMENT HISTORY LOG

Status (Baseline/ Revision/ Change/ Revalidation/ Canceled)	Document Revision	Effective Date	Description
Baseline		5/14/99	Document converted from MSFC-P06.1-C05 to a Directive. Previous history retained in system as part of canceled or superseded ISO Document files.
Revision	A	8/20/99	Changes made to reflect new organizational codes. Appendix A updated and reformatted to be more user friendly; paragraphs 4 and 6 revised accordingly.
Revision	B	9/14/01	Document renumbered to comply with format required by MPG 1410.2. Added NPG 7120.5, MWI 7120.2, NPG 1441.1, and MWI 5330.1 to Section 3, Applicable Documents. Section 9, Quality Records, addressed the maintenance and retention/ disposition requirements for SEB/C records. Appendix A, Part 3: 1.7, added requirement for an assessment of anticipated program risks as part of ASM briefing; 4.1, added requirement for onsite approval letter (if required); 4.2 (new), added requirement for a detailed acquisition risk analysis; 4.3 (now 4.4), added requirement for Safety and Health subfactor and, if not reserved for small business, a Small Disadvantaged Business Utilization subfactor; 4.16 (new), added requirement for synopsis of final RFP which provides the updated schedule date for RFP release; 4.20 (now 4.22), added an option for waiving the preproposal conference; and 6.9, added definition of "cost confidence" adjective assessment at the FPR price.
Revision	C	7/28/2003	Updated URL in footers; Throughout the document deleted "CBDNet" to and substituted with "FedBizOpps"; Throughout the document deleted "Quality Records" to and substituted with "Records"; Throughout the document deleted "Procurement Initiators" to and substituted with "Procurement Requisitioners"; Appendix A, Part 1, Row 13 of the table, change "Associate" to "Assistant" Administrator for Procurement; Appendix A, Part 3, Ref. # 3.1 rewritten to include instructions for maintaining a list of potential candidates to serve on an SEB/C/SEC; Appendix A, Part 3, 5.6, added the Small Business Administration Procurement Center Representative; 6.1, changed Chief Counsel to Legal Office Representative; added 6.20, Review Subcontracting Plan.
Revision	D	11/02/2006	Denoted requirements with the verb "shall" and revised to address gender-neutral requirement in NPR 1400.1, 4.6. Revised references from NPG to NPR, SEB to SEB/C and MPG to MPR. Made grammatical and formatting corrections as needed. Revised Procurement Office to Office of Procurement, Public Affairs to Public and Employee Communications and various titles as a result of Center reorganization. In 3. Applicable Documents, added MPR 5000.1, "Purchasing" and revised documents to correct alphabetical order. In 5. Definitions, added reference to Part 1: Identification of Responsible Parties for additional information. In Appendix, Part 3, Reference 4.1 revised to include the requiring organizations responsibility for coordinating with the S&MA Central POC to assure all safety and mission assurance requirements are included in the documents contained in the Purchase Request Support package and reference Paragraph 4.8 and 4.15. In Part 3, Reference 6.2 revised references from the Protective Services Department to the Protective Services Office. In Part 3, Reference 6.14 added statement to include the selection statement complies with PIC 04-10 "NASA Source

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			Selection Statement Development Guide.” In Part 3, Reference 6.19 added statement to include reference to PIC 04-10 “NASA Source Selection Statement Development Guide.” Reference 7.3 revised to include the Congressional Relations Officer, and the Center Organization. Reference 7.6 added statement to include reference to PIC 04-11 “NASA Procurement Debriefing Guide.” In Appendix, Part 1, as a result of RCAR216 and RCAR230, revised to include language to address the overall contract process for S&MA designated support on an SEB/C and to also address the lack of clarification on when it is appropriate for S&MA to be a voting member of an SEB/C documented in the NFS or MSFC Procurement documents. In Part 3, Reference 2.3 added “Data Requirements Identification/Definition.” In Attachment A, revised to address prohibited use of electronic devices in the SEB/C area.
Revision	E	4/30/2008	Made editorial, grammatical, numerical, and formatting corrections as needed. Revised references from conference to Industry Briefing, organization to department, POP to PP&C, and ASM to PSM. Identified directives and forms, and defined acronyms. In 1. Purpose, revised to state that the MWI is intended to be internal guidance to NASA personnel. In 2. Applicability, revised applicability statement to address the applicability of this directive to the Michoud Assembly Facility. In 3. Applicable Documents, 3.1 and 3.2, deleted reference to 48 CFR Chapter 1. In 6. Instructions, reworded to identify specific sections. In 6.3, added Chief Counsel designee and included senior officials and key offices identified at the PSM. In 6.3, SEB/C Members, added “Voting” reference and deleted reference to competitive negotiated actions of \$50 million or more unless formally waived. In 6.3, SEB/C Ex-officio Advisors, deleted reference to Procurement Officer and/or Deputy Procurement Officer, and removed SEB/C committee chairs and Recorder, also added the Deputy Director of the MSFC Office of the Chief Counsel or designee. In 6.3, Legal, added review of all outgoing correspondence, attend discussions, scoring, debriefings, et al., to key duties. In 6.3, SSA, clarified the delegation of responsibility and added requirement for SEB/C legal and security briefing prior to clearance for participation. In 6.3, defined SEB Recorder as a nonvoting member, added execution an “Individual Certificate for SEB/C Participants,” and undergo a legal and security briefing prior to clearance for participation. In 6.4, SEB Template Schedule, 4.13 revised to DRFP. In 6.4, SEB Template Schedule, 5.7, revised responsibility to include Procurement Member. In 6.4.3, Definition of Schedule Milestones, 1.1, added reference to APT Webpage. In 6.4.3, Definition of Schedule Milestones, 1.2, clarified requirements when posting to acquisition forecast. In 6.4.3, Definition of Schedule Milestones, 1.7, added identification of key NASA officials and small business to be included in the PSM briefing. In 6.4.3, Definition of Schedule Milestones, 1.9, added identification of SSA and the beginning of SEB/C activities. In 6.4.3, Definition of Schedule Milestones, 2.1, added guidance for conducting Market Research and reformatted paragraph. In 6.4.3, Definition of Schedule Milestones, 2.4, added reference to CMM. In 6.4.3, Definition of Schedule Milestones, 3.1, added reference to schedule briefings. In 6.4.3, Definition of Schedule Milestones, 3.2, deleted reference to individual certificate for SEC/C Recorder. In 6.4.3, Definition of Schedule Milestones, 3.7, revised to include participant to SEB/C member. In 6.4.3, Definition of Schedule Milestones, 3.8, revised to include Chairperson verification that all participants have undergone their legal and security briefings. In 6.4.3, Definition of Schedule Milestones, 4.1, added guidance on page limitations and approval by the Procurement Officer. In 6.4.3, Definition of Schedule Milestones, 4.3, added designee to reviewer of

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			<p>deviations to the standard evaluation plan. In 6.4.3, Definition of Schedule Milestones, 4.4, added guidance to the evaluation factors and revised title NAICS. In 6.4.3, Definition of Schedule Milestones, 4.5, added guidance to destroy pages exceeding the limitation and not requesting the certification of cost data. In 6.4.3, Definition of Schedule Milestones, 4.5, added guidance on DCAA assistance on costs audits. In 6.4.3, Definition of Schedule Milestones, 4.6, added reference to CMM software. In 6.4.3, Definition of Schedule Milestones, 4.7, included guidance on approval by the Procurement Officer for IGCE refinement. In 6.4.3, Definition of Schedule Milestones, 4.12, expanded on the importance of review time of DRFP. In 6.4.3, Definition of Schedule Milestones, 4.13, added guidance on the lead of the CRT. In 6.4.3, Definition of Schedule Milestones, 4.17, added guidance on the requirements documentation to a RFP. In 6.4.3, Definition of Schedule Milestones, 4.21, added guidance on the keys to effective and successful Center Review Team. In 6.4.3, Definition of Schedule Milestones, 4.23, added recommendation of the SEB Chair on whether to hold or waive a dry run, and deleted reference to SSA leading the CRT for the final RFP briefing. In 6.4.3, Definition of Schedule Milestones, 4.27, deleted conditions for RFP amendment approval. In 6.4.3, Definition of Schedule Milestones, 5.3, clarified SEB Chair and Recorder responsibilities. In 6.4.3, Definition of Schedule Milestones, 5.4, clarified the Recorder to distribute proposals, and added language to require Offerors to provide a comprehensive listing. In 6.4.3, Definition of Schedule Milestones, 5.6, defined acronym for EEO and clarified responsibilities. In 6.4.3, Definition of Schedule Milestones, 5.7, added guidance verification of Offerors on VETS-100 Report, verification of contractor in the CCR database, revised to "Recorder/Proc Mbr" responsibility, and clarified DUNS. In 6.4.3, Definition of Schedule Milestones, 5.12, revised wording to address role during consensus scoring. In 6.4.3, Definition of Schedule Milestones, 5.11, addressed "significant strengths and "significant weaknesses." In 6.4.3, Definition of Schedule Milestones, 5.12, revised to reiterate that a legal representative shall be present during scoring. In 6.4.3, Definition of Schedule Milestones, 5.14, clarified Past Performance database as NASA deleted reference to MSFC, and clarified reasonable effort to survey past performance references. In 6.4.3, Definition of Schedule Milestones, 5.15, added establishment of the initial proposal evaluation baseline. In 6.4.3, Definition of Schedule Milestones, 6.3, added guidance on the page limits for FPR, weaknesses that do not require the reopening of discussions and agreements that cannot be reached during discussions. In 6.4.3, Definition of Schedule Milestones, 6.16, added HQ Public Affairs and Legislative Affairs to impending selection decision. In 6.4.3, Definition of Schedule Milestones, 6.2, added the requirement to have camera operators to complete a certificate. In 6.4.3, Definition of Schedule Milestones, 6.8, deleted responsibility of the SEB/C Chairperson to assign the FPRs to SEB/C Voting Members, and Evaluators for final evaluation. In 6.4.3, Definition of Schedule Milestones, 6.14, revised to address Office of the Chief Counsel's role in development of the source selection statement. In 6.4.3, Definition of Schedule Milestones, 6.19, revised to include Chief Counsel or designee. In 6.4.3, Definition of Schedule Milestones, 7.1, added ANOSCA and PKI to the SSA's selection decision, and identified APT acronym. In 6.4.3, Definition of Schedule Milestones, 7.3, added guidance on the coordination of communications and notifications. In 6.4.3, Definition of Schedule Milestones, 7.4, added guidance on notifications, and the formal press release. In 6.4.3, Definition of Schedule Milestones, 7.6, revised to include dry runs of</p>
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			debriefings. In 6.4.3, Definition of Schedule Milestones, 7.8, revised reference from Appendix B to Appendix A. In 6.5, Security Requirements for SEB/Cs, moved from Appendix, added proper destruction of copies of SEB/C records and added items not permitted in the SEB meeting area (e.g., cell phones, Blackberries, laptop computers, other personal data-assistant information technology items). In 6.5, Security Requirements, 6.5.5 (i)(2), revised reference from H.(1) to i.(1). In 9. Records, revised Retention Schedule to NRRS 5/13/A and NRRS 5/1/A/3 for records deemed as permanent. In 9.1, revised reference from Appendix B to Appendix A. In 12. Cancellation, revised Revision number and date. In Appendix A, Official Records Created/Maintained by each SEB/C, renumbered from Attachment B, and added Letter to Offerors, revised Minutes of SEB/C, and clarified the retention of copies of Unsuccessful Proposals. In Appendix B, revised titles of templates and forms, adding references to SEB related documents. In Appendix B, added URL address to SEB related forms, formats, and templates. [On 8/29/08, administrative correction made at 5.6 revising from Supply and Equipment Management Officer (SEMO) to Industrial Property Officer (IPO).]
Revision	F	6/16/2010	Made editorial, grammatical, numerical, and formatting corrections as needed. Throughout the document, added responsibilities and key duties for the Assistant Director for Agency Initiatives. Throughout the document, clarified notifications, reviews and approvals of the Proc Officer Assist. Dir., SEB/C Legal Advisor and the PS Office Manager. Revised references from IEM to NEACC and revised from Small Disadvantages Business Utilization to Small Business Utilization. In 1. Purpose and 3.3, revised to include the NASA Source Selection Guide. In 2, revised Applicability Statement. In 3. Applicable Documents, revised title of NPR 7120.5 and added references to NPR 7120.7 NPR 7120.8, PIC 04-10, and PIC 08-11. In 3. Applicable Documents moved MPR 5000.1, PS-OWI-09, and PS-OWI-13 to Appendix C. In 6.3 (4.4), added exception for requirement of mission suitability subfactors if a Safety and Health Plan is required and added requirement for factors considered in the mission suitability evaluation. In 6.4, added introductory text to explain the SEB Template Schedule. In 6.4.3, revised the title to "Identification of Template Schedule Milestones." In 6.4.3 (Ref. 1.6), added other Senior Center Official for delegation of responsibilities by the Center Director. In 6.4.3 (Ref. 1.7), added in the PSM briefing a determination for a Safety and Health Plan and a Safety and the Health mission suitability subfactor. In 6.4.3 (Ref. 3.1), added requirement for an advance copy of a list of potential SEB/C Members to be provided to the Legal Representative. In 6.4.3 (Ref. 3.1.2), clarified the Proc OM to provide an advance copy of the list to the Legal Representative prior to processing the memorandum. In 6.4.3 (Ref. 4.4), clarified the cost evaluation for other than fixed price procurements, added references to NFS 1815.305 and delete the special adjustment factors in Section M for a SDB concern proposal in competition with a large business. In 6.4.3 (Ref. 4.4.4.2, revised from cost resource realism to "cost/resource realism." In 6.4.3 (Ref. 4.7.1), revised from IGCE to GICE. In 6.4.3 (Ref. 4.15), revised from requirement to optional on establishing different due dates for separate parts of the proposal. In 6.4.3 (Ref. 4.17), added reference to the Electronic Reading Room. In 6.4.3 (Ref. 4.17.3.1), added reference to hard copy reading room. In 6.4.3 (Ref. 4.25), added a reference to the RFP web address on NAIS included in the Procurement Sensitivity Letter. In 6.4.3 (Ref. 5.5), clarified the examination comparison of the hardcopy and the electronic copy proposal. In 6.4.3 (Ref. 5.5.1 and Ref. 5.5.2), added clarification of

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			page count. In 6.4.3 (Ref. 5.12), added assessments reflected in the SEBs Mission Suitability evaluation findings. In 6.4.3 (Ref. 5.13), added options for the SEB/C to make adjustments at a higher level when documented in the evaluation plan. In 6.4.3 (Ref. 5.14.3), revised reference for NASA Past Performance database to FAPIIS. In 6.4.3 (Ref. 5.21), added requirements when to conduct communications and to prepare the Memorandum of Record documenting the competitive range determination. In 6.4.3 (Ref. 5.21.3.3), added both legal and procurement will prepare the competitive range memorandum. In 6.4.3 (Ref. 6.9), revised “cost confidence” is a measure of the SEB/C's confidence that the Offeror can successfully perform the effort at the FPR probable cost. In 6.4.3 (Ref. 6.16), added requirement for advance coordination with HQ Procurement for the ANOSCA. In 6.4.3 (Ref. 7.4), added requirement for when to post the Source Selection Statement on NAIS. In 6.4.3 (Ref. 7.9.1.2), clarified when electronic storage and hard copy storage is permissible/required. In 6.5.3.f and 6.5.5.a, added i-phones to list of electronic devices that are to be stored outside the SEB meeting room and not taken into or used the SEB/C area and added exceptions when provided for and approved in the Evaluation Plan. In 6.5.3 c. and d., clarified the use of lockable cabinets for sensitive materials and that cabinets are locked when the SEB area is unoccupied. In 6.5.5, add fax to electronic transmission of SEB/C sensitive materials. In 9. Records, added reference to Forms and Formats in Appendix B. In 12. Cancellation, revised revision number, date, and name of MSFC Director. In Appendix B, revised URL to SEB/C documents. In Appendix C, added Reference documents. In Appendix D, added Acronyms list.
Change	1	8/01/2011	On 8/01/11, at the request of the OPRD, an administrative change was made to revise URL links.
Change	2	9/16/2011	On 9/16/11, at the request of the OPRD, an administrative change made at 1.2, 1.2.1 and Appendix D to delete references to CCI and replace with FSSI.
Revision	G	7/21/2017	Major rewrite in order to document PDT and SEB process improvements. Reformatted in accordance with requirements in NPR 1400.1, MPR 1410.2, and MWI 1410.1. Title changed from “Source Evaluation Board/Committee (SEB/C) Process.”
Revision	H	4/13/2020	Throughout the document deleted “FedBizOpps” and substituted “beta.SAM.gov.” Acronyms revised throughout document. Throughout the document, references to PSSO-provided templates are revised to “approved procurement” templates to accommodate the use of both PSSO and Agency templates. Throughout document, where appropriate revised reference from “Office of Chief Counsel” to “Legal Representative.” In Section 3.5, revised location of link to NASA Source Selection Guide from 1815.308 to 1815.370. In Section 4.12, revised to delete reference to PS-OWI-04, Acquisition Lead Times and Planning, which is no longer utilized. Subsequent 4. sections are renumbered. In 5.1.4.5, deleted item b. as repetitive to 5.1.4.3 b. In 5.1, 5.1.10, Develop Draft Request for Proposal (DRFP) Section J, Attachment J-1, Performance Work Statement (PWS) and Work Breakdown Structure (WBS), is inserted and deleted from 5.2.4. Subsequent 5.2 sections are renumbered. In 5.1.10.4.b, indicated that subsequent market research should be considered in refining the PWS. In 5.1, 5.1.11, Develop Independent Government Cost Estimate (IGCE) is inserted and deleted from 5.4.3, consistent with NFS 1807.105(a)(3). Subsequent 5.4 sections are renumbered. Revised Government Independent Cost Estimate (GICE) to Independent Government Cost Estimate (IGCE) consistent with regulation. Other references to GICE are also revised to IGCE. In

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			<p>5.2.2.1, the PWS summary for the market research synopsis is developed using the PWS developed in 5.1.10. In 5.2.2.5.d, indicated that the results of the market research will be presented to the Req Org, Proc OC, Proc OM, and the SBS, utilizing either a Word document or Powerpoint presentation format depending on the complexities of the acquisition. In 5.2.6.b, reference is made to other appropriate form. In 5.2.6, inserted b. regarding coordination with PS14 for NCWS compatability. In 5.2.6, inserted c. regarding consultation with the Center's Industrial Property Officer. In 5.3, 5.3.3.2, Office of Inspector General, inserted briefing on Acquisition Integrity. Subsequent 5.3.3 sections are renumbered. In 5.3.4.1, inserted item b. regarding SEB labor charge codes. In 5.3.4.5.b, deleted note referencing PS-OWI-04. In 5.4.3.a, clarified that both PSSO- and PS10-provided templates may be utilized when appropriate. In 5.4.3.b, note is expanded to reference inclusion (as applicable) of FAR 52.215-1 provision which provides in paragraph (f)(4) of the provision, the required statement that is in the note. In 5.4.4, note inserted regarding formulation of requirements. In 5.4.4.1.a, clarified that both PSSO- and PS10-provided templates may be utilized when appropriate. In 5.4.4.1.b, indicated that even number page limit is only necessary in the case of hard copy submission as the official copy. In 5.4.4.1.d, indicated that the information is required, by provision, as part of the Contract volume transmittal letter. In 5.4.4.1.e, revised to reference Small Business Utilization Subfactor language for inclusion in Mission Suitability volume. In 5.4.6(a)(4), indicated that the industry briefing normally occurs subsequent to release of the DRFP. In 5.4.8.1.d (2), inserted note regarding the use of Eventbrite for registration activities. In 5.4.9.a (3), incorporated reminder to delete SBU cover page prior to posting DRFP. In 5.4.12.a, clarified to include updating solicitation clauses and provisions identified by the Government after issuance of the DRFP. In 5.4.19.1 (d), incorporated reminder to delete SBU cover page prior to posting RFP. In 5.4.19.2.b, clarified sensitivity letter distribution to be coordinated with CS20 Office of Communications for Center dissemination. In 5.4.24.5, inserted item b. to require SEB Evaluator review of solicitation for familiarity. Inserted 5.5.1.1.f to electronically scan Universal Service Bus (USB) for viruses prior to insertion into Government information technology (IT) systems. In 5.5.2.1.b, added reference to NFS 1815.305-70, removed reference in 5.5.2.1.f, and revised to reference approved template to document the proposal review. In 5.5.2.2.a, indicated that a PSSO template is available. In 5.5.4, Item b. deleted to remove requirement to submit MSFC Form 21 for clearance, with subsequent paragraphs renumbered. In 5.5.4.d and e, updated links to the System for Award Management (SAM). In 5.5.5.a, referred to 5.5.10 for definitions of findings, indicated that significance is not assigned at this step, and deleted items (1) and (2). In 5.5.5, inserted paragraph c. regarding documentation of adequacy. In 5.5.6.1.b, inserted (7) regarding preparation of a detailed cost report. In 5.5.7.a, inserted reference to adequate findings. In 5.5.7.c, revised Past Performance Information Retrieval System (PPIRS) to Contractor Performance Assessment Reporting System (CPARS) and updated link. In 5.5.10.b, revised definitions to align with Section M Mission Suitability Factor Evaluation provision definitions. In 5.5.12.c, changed "will" to "shall" not establish an overall adjectival rating for the Mission Suitability factor. In 5.6.8.2 and 5.6.8.3, corrected paragraph numbering errors. In 5.7.2.2, revised reference NFS 1815.370(j) to NFS 1815.370(i). In 5.7.5.c, deleted reference to telephone scripts. In 5.7.8.a (2), deleted reference to Option to Extend Services value as this value is no longer reflected in the contract as a separate CLIN. In</p>
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			5.7.9.5.b, deleted reference to In 5.7.9.5.b, deleted reference to electronically and to later that same day, mail the original letter to each offeror to leave method of delivery to SEB discretion. In 5.9.1.1.d, inserted additional note regarding consideration of additional time to accommodate potential consolidation of IDR/DRB comments. In 5.9.3.4., Deputy Proc Officer deleted from DRB review of PSM Briefing Charts, DRFP, RFP, and Initial and Final Findings Presentation Charts. In Appendix A, inserted definition for Source Selection Authority. In Appendix B, added "CPARS," added "IGCE," deleted "FedBizOpps," "GICE," and deleted "PIRS." In Appendix G, link to NASA Award Fee Contracting Guide updated. In Appendix H, flowcharts updated to reflect revised numbering in Section 5.4. APPENDIX D is revised to reflect electronic storage of all records based on the NASA Form 1098 filing structure and to insert note regarding documentation retention.
Change	1	10/29/2020	On 10/29/20, at the request of the OPRD, an administrative change was made to the following: References to Procurement Development Team (PDT) revised to Requirements Development Team (RDT) throughout; references to Procurement Source Selection Office (PSSO) revised to Source Selection Office (SSO); Reference to Office of Chief Counsel revised to Office of General Counsel; References to Agency templates made throughout; Appendix D – Records, revised to reference the File Retention Structure – NASA Form 1098 to facilitate the electronic storage of all applicable documents; section 5.1.4.7 revised to a reflect Procurement Officer approval of RDT Membership Request in lieu of RDT appointment, now appointed by the Requiring Org; section 5.1.4.9 inserted for the Requiring Org to prepare and execute an RDT Appointment Letter; section 5.1.9.2 revised to indicate the RDT should coordinate with NASA HQ to determine the appropriate participants when the action is not delegated to the Center; section 5.2.3.2 revised to indicate that the PSM Briefing Charts and minutes will serve as the official acquisition plan; section 5.5.1.1 revised to address Large File Transfer proposal submission.
Change	2	03/5/2021	On 3/5/21, at the request of the OPRD, the following administrative changes were made: Section 4 updated to reflect current document titles and elimination of MSFC Form Letter 21. Section 5.1.2.2.d inserted to address Product Service Line activities. Section 5.1.4.10 inserted to address Procurement Administrative Lead Time (PALT+) data entry. Section 5.1.9, Develop and Submit Master Buy Plan, deleted. Sections 5.2.6 and 5.4.2 updated to eliminate Phase-in purchase order. Section 5.5.4 update links. Section 5.6.3 note updated to clarify discussions format. Section 5.6.4.2 updated to eliminate requirement to record discussions. Section 5.7.7.2 note updated to clarify ANOSCA/notification process for small business set-asides. Section 5.8.1 notes updated to clarify debriefing process. Updated Appendix A MWI Process Flow Chart references. Other minor administrative edits made throughout.



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## 1. PURPOSE

1.1 To provide instructions and requirements to assist RDTs and SEBs in determining and preparing the appropriate acquisition strategy for a competitive procurement and in conducting an equitable and thorough evaluation of proposals using formal source selection procedures in accordance with United States Code, Federal Acquisition Regulation (FAR), NASA FAR Supplement (NFS), MPR 5000.1, the NASA Source Selection Guide, and the NASA Procurement Debriefing Guide.

1.2 To provide instructions that assist RDTs in defining requirements, conducting market research, developing the Procurement Strategy Meeting (PSM) briefing charts, establishing high-fidelity Sections A through K of the draft solicitation, and in gathering background and historical information for use in the solicitation phase.

1.3 To provide instructions that enable an SEB to finalize and issue the solicitation, evaluate proposals, and present findings resulting from proposal evaluation to assist the Source Selection Authority's (SSA) decision-making process, followed by debriefing of offerors.

## 2. APPLICABILITY

2.1 This MWI applies to Center personnel, programs, projects, and activities, including contractors and resident agencies to the extent specified in their respective contracts or agreements. ("Contractors," for purposes of this paragraph, include contractors, grantees, Cooperative Agreement recipients, Space Act Agreement partners, or other agreement parties.)

2.2 This MWI applies to the Michoud Assembly Facility (MAF).

2.3 This MWI applies the following: all mandatory actions (i.e., requirements) are denoted by statements containing the term "shall." The terms: "may" or "can" denote discretionary privilege or permission, "should" denotes a good practice and is recommended, but not required, "will" denotes expected outcome, and "are/is" denotes descriptive material.

2.4 This MWI applies the following: all document citations are assumed to be the latest version unless otherwise noted.

## 3. AUTHORITY

3.1 United States Code (U.S.C.)

3.2 Federal Acquisition Regulation, 48 CFR Chapter 1

3.3 NASA FAR Supplement, 48 CFR Chapter 18

3.4 NASA Guide for Successful Headquarters Procurement Strategy Meetings (see NFS 1807.105)

3.5 NASA Source Selection Guide (see NFS 1815.370)

3.6 NASA Procurement Debriefing Guide (see NFS 1815.505)

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3.7 MPR 5000.1, Purchasing

#### **4. APPLICABLE DOCUMENTS AND FORMS**

- 4.1 NPD 5000.2, Small Business Subcontracting Goals
- 4.2 NPR 2200.2, Requirements for Documentation, Approval, and Dissemination of Scientific and Technical Information
- 4.3 NPR 7120.5, NASA Space Flight Program and Project Management Requirements
- 4.4 NPR 7120.7, NASA Information Technology Program and Project Management Requirements
- 4.5 NPR 7120.8, NASA Research and Technology Program and Project Management Requirements
- 4.6 NRRS 1441.1, NASA Record Retention Schedules
- 4.7 MPR 3200.1, Onsite Location or Relocation of Contractor or Other Government Agency Personnel at MSFC
- 4.8 MPR 3600.2, Time and Attendance Process
- 4.9 MPD 1200.3, Delegations Of Authority For Marshall Space Flight Center (MSFC)
- 4.10 MWI 5100.1, Initiating Procurement Requisitions
- 4.11 MGM 3600.1, Attendance and Leave Guidance
- 4.12 MGM 7120.3, MSFC Data Management Guidance
- 4.13 PS-OWI-05, Review and Execution of Procurement Documents
- 4.14 PS-OWI-06, Socioeconomic Programs
- 4.15 Standard Form 33, Solicitation Offer and Award
- 4.16 Standard Form 1449, Solicitation/Contract/Order for Commercial Items
- 4.17 NASA Form 1098, Checklist for Contract Award File Content
- 4.18 NASA Form 1787, Small Business Coordination
- 4.19 MSFC Form 1407, Concurrence Sheet

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## 5. INSTRUCTIONS

*Note: Some steps occur concurrently and therefore these instructions do not necessarily list all actions in chronological order. Consult the Office of Procurement, Source Selection Office (SSO) (PS60) for the recommended timeline of a particular acquisition.*

### 5.1 Acquisition Planning and RDT Establishment

#### 5.1.1 Initial Identification of Requirements

Actionee		Action
Procurement Support Personnel to the Requiring Organization	5.1.1.1	<p>Will maintain a dialogue with the Requiring Organization (hereafter referred to as “Req Org”) to identify potential acquisition needs estimated at \$10 million or greater that additionally require a competitive source selection approach, such as efforts requiring SEB procedures (as defined for acquisitions identified in NFS 1815.300-70(a)(1)(i)).</p> <p><i>Note: The timeframe for completing a significant competitive source selection approach can vary greatly, with larger efforts ranging eighteen to twenty four months for completion; early identification of new or reoccurring acquisition needs will afford all parties the maximum time practicable to complete a competitive source selection approach as detailed throughout this MWI.</i></p>
Procurement Office Manager Supporting the Requiring Organization (hereafter referred to as “Proc OM”) SSO Office Manager (hereafter referred to as “SSO OM”)	5.1.1.2	<p>Will determine if the identified acquisition will be subject to the formation of a RDT effort subject to the procedures detailed in this MWI.</p> <p><i>Note: Examples of acquisition types that could require competitive source selection approaches but would generally fall outside of this MWI would include, but not be limited to: broad agency announcements, grants, cooperative agreements, interagency agreements, Space Act agreements, construction or architect-engineering efforts, or efforts utilizing sealed-bidding type procedures.</i></p>
Req Org	5.1.1.3	Will, upon the Proc OM and SSO OM’s determination of an acquisition subject to RDT efforts in accordance with this MWI, provide information regarding the acquisition requirements to their respective procurement support personnel, including:

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		<p>a. Type of acquisition (i.e., supplies/products or non-personal services).</p> <p>b. Description of requirements.</p> <p>c. Estimated dollar value.</p> <p>d. Estimated need-date.</p> <p>e. Name of requisitioner, e-mail address, organization code, and phone number.</p> <p>f. Whether the acquisition is a commercial or non-commercial supply/product or service.</p>
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#### 5.1.2 Place Requirements on Acquisition Forecast

Actionee		Action
Proc OM	5.1.2.1	<p>a. Shall, in accordance with NFS 1807.72, prepare an acquisition forecast submission for the requirements, with the submission to define the requirements in general terms.</p> <p>b. Will coordinate with the Office of Procurement's Small Business Specialist (SBS) prior to the submission of the acquisition forecast for assistance in establishing the North American Industry Classification System (NAICS) code and any preliminary socio-economic preference (i.e., small business set-aside) recommendations.</p> <p>c. Shall provide the Office of Procurement (PS01) the acquisition forecast submission for the Procurement Officer (hereafter referred to as "Proc Officer") to submit on the Center's acquisition forecast in accordance with NFS 1807.7202.</p>
Procurement Office Chief Supporting the Req Org (hereafter referred to as "Proc OC")	5.1.2.2	<p>a. Will coordinate with the Office of Procurement, Policy and Information Management Office (PS10) to add reoccurring acquisitions to the MSFC Acquisition Planning Tool (APT) website where it is available for public viewing.</p> <p>b. Will coordinate with the Proc OM and SSO OM to determine the timing of adding new acquisitions to APT.</p> <p>c. Will add new acquisitions to APT following approval from the Proc OM.</p>

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		d. Will, if the action is a Product Service Line (PSL) activity, coordinate the activity with the Procurement Portfolio Manager, the Enterprise Requirement Manager, and the SBS (when required by NFS 1819.202) in accordance with Procurement Information Circular 18-01.
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### 5.1.3 Brief the Req Org

Actionee		Action
Proc OC	5.1.3.1	Should, utilizing an approved procurement template, develop charts for the acquisition source selection introduction presentation to provide an overview of the RDT process and potential follow-on source selection process, emphasizing key actions to be performed by the Req Org and the appropriate office within the Office of Procurement.
Proc OM SSO OM or PS60 Advisor (hereafter referred to as “SSO Advisor”)	5.1.3.2	Will brief the Req Org on the acquisition source selection process. If developed in Section 5.1.3.1 above, utilize the acquisition source selection introduction presentation.
Req Org	5.1.3.3	Should, utilizing guidance set forth by the Proc OM and SSO OM during the source selection introduction presentation, grant industry requests for “marketing meetings” as much as practicable until the procurement sensitivity letter is issued (in accordance with 5.4.17 and 5.4.19).

### 5.1.4 Identify and Establish RDT Membership

Actionee		Action
Req Org	5.1.4.1	Will provide to the Proc OC and Proc OM:  a. A list of any known potential sources (hereafter referred to as “source list”) for the supplies/products or non-personal services to be acquired.  b. A list of qualified personnel dedicated to support requirements development.
Proc OM	5.1.4.2	Will identify qualified procurement personnel dedicated to support acquisition development.
Req Org  Proc OM	5.1.4.3	Will identify:  a. Prospective RDT candidates in coordination with the Office of the General Counsel (LS01).

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		b. Procurement Specialist (hereafter referred to as “Proc Spec”) to be assigned the acquisition's RDT phase.
Proc OC	5.1.4.4	<p>a. Will provide the source list to all persons considered as prospective RDT candidates to assist in identifying potential conflicts of interest (COIs).</p> <p>b. Will provide the source list and list of prospective RDT members to the Office of the General Counsel for assistance in identifying potential COIs.</p>
Req Org Proc OM	5.1.4.5	Will identify final RDT candidates following coordination with the Office of the General Counsel's identification of potential COIs.
SSO OM	5.1.4.6	<p>Will determine:</p> <p>a. In coordination with the Proc OM, if it is appropriate for a Recorder to support the acquisition during the RDT phase.</p> <p>b. If a Recorder is deemed appropriate, the specific Recorder.</p> <p>c. The specific SSO Advisor assigned to support the acquisition.</p>
Proc Spec or Recorder	5.1.4.7	<p>a. Shall, utilizing an Agency template, prepare an RDT Membership Request and route through the SSO Advisor, Proc OC, and Proc OM, for Proc Officer approval.</p> <p>b. Will, upon formal appointment of a RDT, maintain a list of all attendees at all key RDT meetings and events.</p> <p>c. Will, for the assigned Recorder, bring to the attention of the RDT (or SEB when applicable) any known potential conflicts of interest relative to interested parties/offers if identified.</p>
Recorder or SSO Advisor	5.1.4.8	<p>a. Will brief RDT participants on SSO online resources as well as the SSO/RDT filing system to maintain overall document control.</p> <p>b. Will, utilizing an SSO template, provide RDT members with a “kickoff” overview of the RDT process.</p>
Req Org	5.1.4.9	<p>Shall, utilizing an Agency template, prepare and execute an RDT Appointment Letter.</p> <p><i>Note: The RDT Member appointment memorandum includes establishment of the RDT Lead position.</i></p>

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Proc OC	5.1.4.10	Shall, in accordance with NFS 1807.7102, submit a record of the acquisition into the Procurement Administrative Lead Time (PALT+) Internet-based tool.
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#### 5.1.5 Develop RDT Security Plan

Actionee		Action
RDT Lead	5.1.5.1	<p>a. Shall, utilizing an approved procurement template and in coordination with the SSO Advisor, prepare a security plan to document the methods the RDT will follow to ensure RDT security.</p> <p>b. Will provide all RDT Members with a security briefing utilizing approved procurement briefing charts and brief all RDT Members on the acquisition-specific RDT security plan.</p>
RDT Members	5.1.5.2	<p>Following the RDT Lead's security presentation:</p> <p>a. Will read the full contents of the RDT security plan and seek clarification from the RDT Lead for any aspect of the plan that is not fully understood.</p> <p>b. Shall sign the RDT security plan after its contents are fully understood and the member agrees to follow the plan.</p>
Proc Spec or Recorder	5.1.5.3	Shall retain the RDT member-signed security plan in the RDT official records.

#### 5.1.6 Verify Program Planning and Control (PP&C) Funding

Actionee		Action
Req Org Resource Analyst		Will, early in the process, verify that funds are in the PP&C funding profile for the acquisition.

#### 5.1.7 Develop Acquisition Schedule

Actionee		Action
SSO Scheduler Proc Spec RDT Lead	5.1.7.1	<p>Will develop a baseline logic-linked acquisition schedule in support of the program(s) or project(s) showing key acquisition milestones.</p> <p><i>Note: See Appendix H.1 for sample RDT process flow charts.</i></p>
Proc Spec	5.1.7.2	Will report progress against the acquisition baseline schedule to the SSO Scheduler, at a minimum, on a monthly basis.
RDT Lead	5.1.7.3	Should offer progress reviews to the Proc OM, SSO OM, and Req Org Director (or designee), at a minimum, every



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		two months from the establishment of the RDT until transfer of responsibilities to the follow-on source selection effort.
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#### 5.1.8 Determine Location for RDT Effort

Actionee		Action
Proc OM  Req Org		<p>a. Will, in coordination with the SSO OM, determine if the RDT effort will be conducted within a secure environment.</p> <p>b. Will, in coordination with the SSO Facilities Coordinator, arrange for adequate secure space and equipment to conduct the RDT effort if it is determined to require a secure environment.</p> <p><i>Note: While SSO-supported efforts are normally conducted in secure SSO-dedicated areas, RDT efforts, although sensitive, are generally not required to be performed in a secure working environment.</i></p>

#### 5.1.9 Develop Draft Request for Proposal (DRFP) Section J, Attachment J-1, Performance Work Statement (PWS) and Work Breakdown Structure (WBS)

*Note: Sections A through J of the DRFP constitute the model contract portion of the draft solicitation, with Section K constituting the offeror's representations/certifications.*

Actionee		Action
RDT Members	5.1.9.1	Will develop and maintain all sections of the RDT DRFP in an electronic format (primarily Microsoft Word).
Proc Spec	5.1.9.2	Should provide the RDT with performance-based acquisition guidance.
SSO Advisor	5.1.9.3	Should provide performance-based PWS samples if the acquisition has not previously been competed.
RDT Members	5.1.9.4	<p>a. Will, in coordination with the Req Org, develop an organized, performance-based draft PWS with an appropriately detailed WBS.</p> <p>b. Should consider incorporating the results of any subsequent market research findings/industry capabilities into desired PWS requirements.</p> <p>c. Should consider each of the following elements when preparing the draft PWS. These elements are not all-inclusive, but represent key items for consideration:</p> <p>(1) Contractor Tasks</p>

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		<p><i>Note: Most sentences involving contractor tasks in the PWS begin with “The Contractor shall...”; these contractor tasks describe specific activities the contractor will perform, but do not specify how it will perform the work.</i></p> <p>(2) Specifications</p> <p><i>Note: Most sentences involving specifications in the PWS begin with “The product (or service) shall...” in order to describe or identify something precisely or in stating precise requirements.</i></p> <p>(3) Quality assurance requirements</p> <p><i>Note: Ensure technical quality requirements relating to the product or service that are not otherwise detailed in Section E of the model contract are documented in the PWS specifications.</i></p>
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#### 5.1.10 Develop Independent Government Cost Estimate (IGCE)

Actionee		Action
Req Org Resource Analyst  Cost/Price Analyst  RDT Members	5.1.10.1	<p>Shall prepare an IGCE with cost/pricing estimates that support both the overall PWS and its individual WBS elements in accordance with NFS 1807.105(a)(3).</p> <p><i>Note: It is essential that individual PWS/WBS estimates that make up the overall IGCE reflect an accurate estimation of the supplies/products or services being acquired in order to perform a detailed Cost/Price proposal evaluation. This preparation of the IGCE and any WBS refinement necessitates a firm understanding of the tasks to be performed, the effort (e.g., labor hours, subcontracts, materials) required, knowledge of prevailing industry/locality wage rates, industry overhead or burden rates, and typical contractor accounting systems. While NFS 1807.105(a)(3) describes the IGCE as an element of the acquisition strategy, a final IGCE at this stage may not be feasible. The IGCE should be refined and finalized no later than Section 5.4.13 of this MWI.</i></p>
RDT Members	5.1.10.2	Should assist the Req Org in developing the IGCE, to include such areas as performing additional market research, obtaining expertise required, and supplying historical cost information.

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## 5.2 Requirements Definition, Procurement Strategy, and Draft Solicitation

### 5.2.1 Obtain Initial Funding

Actionee		Action
Req Org Resource Analyst	5.2.1.1	Will generate a Procurement Requisition (PR) (i.e., purchase request or purchase requisition) to support the acquisition in accordance with NFS 1804.7301 and MWI 5100.1.  <i>Note: The approved PR should, at a minimum, be issued for funds in an amount sufficient to establish a planning PR (i.e., a planning PR having a minimum of \$1).</i>
Proc Spec	5.2.1.2	Will obtain an approved certification that funding is available prior to the RDT posting any presolicitation notices on the Government-wide point of entry (GPE) (i.e., <a href="https://beta.sam.gov/">https://beta.sam.gov/</a> ).

### 5.2.2 Develop Performance Work Statement (PWS) Summary and Conduct Market Research

Actionee		Action
RDT Members  Req Org	5.2.2.1	a. Will, utilizing the previously developed PWS, develop a PWS summary for inclusion in the market research synopsis, which generally includes a brief overview of each major PWS area.  <i>Note: The overview should be of sufficient clarity to allow industry insight into each PWS area in order to gauge their level of interest and capabilities relative to the requirements.</i>  b. Will, utilizing an approved procurement template, prepare a written determination that none of the functions to be performed are inherently governmental in accordance with FAR 7.503(e).
Proc Spec	5.2.2.2	Shall, in accordance with NFS 1804.171 and 1804.1603, utilize the NASA Contract Writing System (NCWS) to establish a unique thirteen digit alphanumeric Procurement Instrument Identifier (PIID) (i.e., numbering scheme) for consistent use throughout all notices posted on the GPE.
RDT Members	5.2.2.3	Shall, in accordance with NFS 1805.205-70 and NPD 5000.2, and utilizing an Agency GPE template, develop a presolicitation Sources Sought Notice for acquisitions over \$50 million. The posting requirement is optional for proposed contract actions of \$50 million or less.

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		<i>Note: Responses to sources sought notices or Request for Information (RFI) notices are helpful in further establishing whether the requirements may be set aside for small businesses as it aids in the determination of eligible small businesses, including Service-Disabled Veteran-Owned, Small Disadvantaged, Women-Owned, Historically Black Colleges and Universities/Minority Serving Institutions, Historically Underutilized Business Zone, and Veteran-Owned Businesses in the appropriate industrial classifications (in accordance with PS-OWI-06).</i>
Proc Spec	5.2.2.4	<p>Following the review the Sources Sought Notice by the SSO Advisor, Proc OC, and Proc OM:</p> <p>a. Will ensure a peer with commensurate GPE posting experience is available (as a second set of eyes) to confirm information to be uploaded on the GPE is accurate.</p> <p>b. Shall post the presolicitation notice on the GPE.</p>
RDT Members	5.2.2.5	<p>a. Will conduct market research in accordance with FAR Part 10 and document results utilizing an approved procurement template.</p> <p>b. Should, at a minimum, answer the following questions when conducting market research:</p> <p>(1) Are the products/supplies or services required by the Government available in the commercial marketplace?</p> <p>(2) If not procured commercially, could the Government revise its requirements (while still satisfying its basic need) and use a commercially available item/service?</p> <p>(3) When procured commercially, what type of contract is used most often?</p> <p>(4) What types of contract terms, conditions, and performance incentives are normally utilized?</p> <p>(5) What companies or types of companies can the Government expect to propose on these requirements?</p> <p>(6) What are industry's capabilities relative to socio-economic status in order to assist Center Management in</p>

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		<p>determining whether to conduct the acquisition as a small business set-aside or as a full and open competition?</p> <p>c. Will evaluate market research to assess industry capabilities and potential impacts to the requirements.</p> <p>d. Will present the results of the market research to the Req Org, Proc OC, Proc OM, and the SBS utilizing an approved procurement template. The report or presentation, depending upon the complexity of the acquisition, will describe the information obtained as the result of market research in order to assist in determining whether the follow-on source selection process will utilize a small business set-aside or full and open competition.</p>
Proc Spec	5.2.2.6	<p>Will consult the SBS to refine:</p> <p>a. The NAICS code.</p> <p>b. Any small business set-aside recommendations.</p> <p>c. The small business subcontracting goal recommendations if the acquisition will be a full and open competition.</p> <p><i>Note: Based upon a decision to set-aside the acquisition, the resulting solicitation must reflect consideration of any specific requirements relative to the socio-economic category selected, such as third-party certification requirements for economically-disadvantaged women-owned or women-owned small businesses. The SBS should be consulted in this regard.</i></p>
RDT Members Req Org	5.2.2.7	Will update the source list after market research is conducted and provide to the Proc OC and OM.
Proc OC Proc OM	5.2.2.8	<p>Will review the source list to determine that:</p> <p>a. Companies listed are appropriate.</p> <p>b. Actual or potential COIs have been identified.</p> <p>c. All known potential sources are included.</p>
Proc Spec	5.2.2.9	a. Will, after the Proc OC and OM reviews the source list and provides any changes to the Proc Spec, provide the source list to all persons serving on or assisting the RDT.

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		b. Will provide the source list and list of RDT members to the Office of the General Counsel for an updated assessment of potential COIs.
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### 5.2.3 Develop and Present PSM Briefing Charts

Actionee		Action
Proc Spec	5.2.3.1	Shall document the established small business strategy on NASA Form 1787 and submit for approval in accordance with PS-OWI-06.
RDT Members	5.2.3.2	<p>a. Shall, utilizing an Agency PSM template, prepare the PSM Briefing Charts.</p> <p>b. The PSM Briefing Charts and minutes will serve as the official acquisition plan, providing a comprehensive approach for meeting requirements that addresses the guidance/elements at FAR 7.105 and NFS 1807.105.</p> <p><i>Note: Creation of the PSM Briefing Charts should be an interactive process with all RDT members thoroughly reviewing the proposed strategy to ensure a clear, efficient, and effective approach for conducting the acquisition.</i></p> <p>c. Will, as part of PSM briefing chart preparation, determine if the management approval requirements listed in NPR 7120.5, NPR 7120.7, or NPR 7120.8 apply to the acquisition and:</p> <p>(1) Obtain management approvals if any requirements apply.</p> <p>(2) Seek waivers where the Req Org desires relief from any applicable NPR 7120.5, NPR 7120.7, or NPR 7120.8 requirements.</p> <p>(3) Document in the PSM Briefing Charts if these requirements do not apply to acquisition.</p> <p>d. Will, prior to submitting PSM Briefing Charts for document review procedures, at a minimum, ensure charts satisfy all aspects of “PSM Briefing Charts Review” in accordance with Appendix F.1.1.</p>
Proc Spec or Recorder  RDT Lead	5.2.3.3	Will, in accordance with 5.9.1, ensure proper timelines are followed for initiating formal RDT document review procedures.

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		<i>Note: See Document Review Timelines for PSM IDR in accordance with Appendix E.1 and RDT Document Review Flow-Chart in accordance with Appendix E.2.</i>
RDT Lead	5.2.3.4	Shall, after RDT Members finalize PSM Briefing Charts, conduct PSM Initial Document Review (IDR) in accordance with 5.9.2.
RDT Members	5.2.3.5	Will, prior to routing PSM Briefing Charts for Document Review Board (DRB), at a minimum, ensure charts satisfy all aspects of “PSM Briefing Charts Review” in accordance with Appendix F.1.2.
RDT Lead	5.2.3.6	Shall conduct PSM DRB in accordance with 5.9.3.
RDT Members	5.2.3.7	Will, prior to routing PSM Briefing Charts for PSM, at a minimum, ensure charts satisfy all aspects of “PSM Briefing Charts Review” in accordance with Appendix F.1.3.
RDT Lead	5.2.3.8	Shall conduct PSM in accordance with 5.9.4.
Proc Spec	5.2.3.9	<p>a. Shall, for acquisitions requiring contractor personnel to be located onsite at MSFC, in accordance with the template provided in MPR 3200.1, ensure the Req Org completes a memorandum and routes for approval.</p> <p>b. For acquisitions requesting NASA HQ approvals or deviation requests in accordance with FAR or NFS (e.g., approval for a single source indefinite-delivery, indefinite-quantity (IDIQ) award over the FAR threshold in accordance with FAR 16.504(c)(1)(ii)(D)(1); use of an incentive or award fee contract type in accordance with NFS 1816.401(d); deviation request for period of performance to extend beyond five years in accordance with NFS 1817.204(e)):</p> <p>(1) Shall prepare and finalize NASA HQ approval/deviation requests.</p> <p>(2) Will simultaneously route all approval/deviation requests for concurrence through MSFC, following the routing order for documentation of a substantive nature in accordance with PS-OWI-05.</p> <p>(3) Will, upon receipt of MSFC concurrence for all approval/deviation requests, submit all approval/deviation requests simultaneously to NASA HQ for approval.</p> <p><i>Note: Simultaneous group routing/submission provides all reviewers a comprehensive understanding of the acquisition's approvals/deviations being requested.</i></p>

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#### 5.2.4 Develop DRFP Section J, Attachment J-2 Data Procurement Document (DPD)

Actionee		Action
RDT Members		<p>a. Will ensure data requirements are sufficient to appropriately manage the work content and ensure contract requirements are satisfied.</p> <p><i>Note: Avoiding non-essential data requirements results in a more cost-effective acquisition.</i></p> <p>b. Will coordinate with the Req Org to verify the data “Type” (e.g., 1, 2, 3).</p> <p><i>Note: Data requirements that necessitate Government approval before the contractor is allowed to proceed with work are very expensive and costly to administer. Refer to MGM 7120.3 for guidance in developing data requirements.</i></p> <p>c. Will request support from the Center Data Requirements Manager (CDRM) in generating the DPD.</p>

#### 5.2.5 Develop DRFP Section J Table of Contents and Additional Section J Attachments

Actionee		Action
RDT Members		<p>Will develop supplemental Section J attachments based on supply/product or service being acquired and contract type. The following listing of commonly-utilized attachments is not intended to be all-inclusive:</p> <p>a. WBS Summary.</p> <p><i>Note: This attachment will serve as an exact numbered outline of the established PWS structure.</i></p> <p>b. Government Surveillance Plan.</p> <p>c. Performance Requirements Summary (PRS).</p> <p>d. Small Business Subcontracting Plan.*</p> <p>e. Information Technology (IT) Security Management Plan.*</p> <p><i>Note: Contracts containing NFS 1852.204-76 require an IT Security Management Plan.</i></p>



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	<ul style="list-style-type: none"> <li>f. IDIQ Rates.*</li> <li>g. IDIQ Task Order Flow Process.</li> <li>h. IDIQ Task Order Summary.</li> <li>i. Labor Category Descriptions.</li> <li>j. Department of Labor Wage Determinations.</li> <li>k. Installation-Accountable Government Property (IAGP).</li> <li>l. Government-Furnished Property (GFP).</li> <li>m. Government-Furnished Computer Software.</li> <li>n. Government-Provided Services.</li> <li>o. Performance Evaluation Plan (PEP).</li> <li>p. Organizational Conflict of Interest (OCI) Plan.*</li> <li>q. Safety, Health, and Environmental (SHE) Plan.*</li> <li>r. Applicable Documents.</li> <li>s. Acronyms.</li> </ul> <p><i>Note: Items marked * consist of content provided by offerors. The RDT determines the need for incorporation, rather than the development, of these attachments.</i></p>
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#### 5.2.6 Develop DRFP Sections A through I, and Section K

Actionee	Action
Proc Spec	<ul style="list-style-type: none"> <li>a. Shall, based on contract type, develop the standard Section B through I contract clauses utilizing NCWS in accordance with NFS 1804.171, to additionally include development of the Section A Standard Form 33 (SF 33).</li> <li>b. Shall coordinate the proposed Contract Line Item Number (CLIN) structure and invoicing strategy with PS14, Procurement IT Systems Office, to ensure compatability with NCWS.</li> <li>c. Shall, in accordance with NFS 1845.102-71(b), consult the Center's Industrial Property Officer (IPO) for applicable</li> </ul>

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		<p>property clauses to be included in the solicitation and, if applicable, preparation by the IPO of MSFC Form 4184, IPO Solicitation/Contract Review for Government Property Requirements.</p> <p>d. Will structure the contract to include a phase-in period concurrent with the predecessor contract in accordance with NFS 1817.204(e)(2)(ii).</p> <p><i>Note: It is recommended that the phase-in period be the first Contract Line Item Number (CLIN) and firm-fixed-price (FFP) regardless of primary contract type.</i></p> <p>e. Should, with the assistance of RDT Members, consider any unique contract performance situations that would require inclusion of supplemental contract clauses necessary to protect the Government's interests.</p> <p>f. Shall develop Section K.</p> <p><i>Note: Ensure utilization of the previously approved NAICS code for the appropriate Section K fill-in(s).</i></p>
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#### 5.2.7 Gather Background and Historical Information

Actionee		Action
RDT Members		Will gather workload indicators and other pertinent data to facilitate preparation of the background and historical information provided with Section L of the DRFP.

#### 5.2.8 Complete RDT DRFP Document Review

Actionee		Action
RDT Members	5.2.8.1	Will, prior to submitting the RDT's high-fidelity DRFP Sections A through K for document review procedures, at a minimum, ensure applicable documents satisfy all aspects of "Solicitation Review" relative to the RDT level in accordance with Appendix F.2.1.
RDT Lead	5.2.8.2	Shall, after RDT Members finalize high-fidelity DRFP Sections A through K, conduct RDT DRFP IDR in accordance with 5.9.2.
RDT Members	5.2.8.3	Will, prior to routing high fidelity DRFP Sections A through K for DRB, at a minimum, ensure applicable documents satisfy all aspects of "Solicitation Review" relative to the RDT level in accordance with Appendix F.2.2.
RDT Lead	5.2.8.4	Shall conduct RDT DRFP DRB in accordance with 5.9.3.

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RDT Members	5.2.8.5	Will organize all RDT documents for transfer to SEB or other applicable follow-on source selection effort.
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### 5.3 Appointment of SSA, SEB Establishment, Transfer of RDT to SEB

*Note: Remainder work instructions are in accordance with NFS 1815.370 following SEB-specific procedures. Should an alternate post-RDT source selection procedure be utilized (e.g., any Source Evaluation Team (SET) effort such as Lowest Price Technically Acceptable (LPTA) where there is no tradeoff, Price Performance Tradeoff (PPTO), any other source selection approach such as a Federal Supply Schedule process (including General Services Administration (GSA)), or any other source selection approach), that alternate source selection effort will follow its unique FAR source selection-specific procedures.*

#### 5.3.1 Obtain Personnel Lists, Develop Appointment Letters, and Secure SEB Facilities

Actionee		Action
All MSFC Direct Reports	5.3.1.1	Shall submit an annual list of qualified and competent-to-serve personnel for assignments on SEBs or any similar competitive source selection approaches to the SSO by January 1st of each year.
SSO Scheduler	5.3.1.2	Shall maintain a SSO list/database of Center personnel who have previously served on an SEB or any similar competitive source selection approach.
Req Org	5.3.1.3	Will provide SSO a current list of appropriately qualified and dedicated personnel from its own organization who are immediately available to support the specific acquisition's SEB activities.
Proc OM	5.3.1.4	<p>a. Will contact the SSO OM to obtain the aforementioned personnel lists to assist in determining a qualified pool of prospective candidates to serve on the SEB.</p> <p>b. Will, in coordination with the Proc OC, arrange for adequate secure space and equipment to conduct the SEB.</p> <p><i>Note: Normally, SEB efforts are conducted in secure SSO-dedicated areas.</i></p>
Req Org Director Proc Officer Proc OM SSO OM	5.3.1.5	<p>a. Will, in accordance with NFS 1815.370(e), and with the assistance of the Office of General Counsel, use the aforementioned lists of SEB-candidate personnel to develop a list of prospective SEB member candidates for the acquisition.</p> <p>b. Will determine the number of SEB voting members, with a working goal of three SEB voting members.</p> <p>c. Shall, in accordance with NFS 1815.370(e)(4), limit SEB membership to a maximum of seven SEB voting members.</p>

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		<p>d. Will additionally consider the following when contemplating specific prospective SEB member candidate positions:</p> <p>(1) It is important to have senior representatives serving as SEB voting members, with these members having the requisite technical knowledge or expertise in various functional areas specific to the unique acquisition requirements, as well as the objectivity to perform full and fair evaluations of offerors.</p> <p><i>Note: All SEB voting members should possess these critical traits so there can be no claim of bias by offerors who are not selected for award.</i></p> <p>(2) In cases where objectivity is a concern, it may be appropriate to designate a management official from outside of the Req Org to serve as SEB Chairperson (hereafter referred to as “SEB Chair”).</p> <p>(3) For acquisitions that the Safety and Mission Assurance (SMA) (QD01) directorate determines SMA involvement is critical, the SEB should include at least one SMA voting member.</p> <p>(4) Depending on the scope and requirements of the acquisition, the Proc Officer may nominate a Procurement Member (hereafter referred to as “Proc Mbr”) to serve as either a voting or non-voting member of the SEB.</p>
SSO OM	5.3.1.6	Will, if not previously established during the RDT phase, identify the Recorder who will participate as a non-voting SEB member.
Req Org Director Proc Officer	5.3.1.7	<p>a. Will, for any prospective SEB member candidates that do not reside in either the Req Org or the Office of Procurement, contact the prospective SEB voting member's applicable Organization Director to discuss candidate availability and qualifications.</p> <p>b. Will, for prospective SEB member candidates that do not reside in the Req Org or Office of Procurement, discuss with the Center Director any outstanding issues that preclude obtaining the necessary SEB voting members.</p>
Proc Officer	5.3.1.8	Will, in accordance with MPD 1200.3 as the center-delegated Head of the Contracting Activity (HCA), determine the acquisition-specific SSA.

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Req Org Director (or designee)  Proc OM	5.3.1.9	<p>a. Will inform all prospective SEB member candidates of expectations when accepting a special assignment to support an SEB activity, to include alignment of individual work schedules/hours necessary to satisfy a standard SEB procurement schedule in accordance with MGM 3600.1, Chapter 1.</p> <p>b. Will provide the source list to all persons who remain prospective SEB member candidates for assistance in identifying potential COIs.</p> <p>c. Will provide the source list and list of prospective SEB member candidates to the Office of the General Counsel for assistance in identifying potential COIs.</p>
SEB Member Candidates	5.3.1.10	Shall, utilizing an approved procurement template, prepare an individual COI disclosure based upon the source list, and prepare the applicable Office of Government Ethics clearance form as instructed by the Office of General Counsel upon individual SEB member nomination.
Proc OC	5.3.1.11	Will ensure SEB member candidates are not provided access to any sensitive SEB material until the Office of the General Counsel clears the candidate and all of their executed forms/certificates are on file.
Req Org  Proc OM	5.3.1.12	Will identify final SEB members and their respective roles (i.e., SEB Chair, Proc Mbr, SEB Voting Members, and any non-voting SEB members) following coordination with the Office of the General Counsel's identification of potential COIs.
Recorder  Proc Mbr	5.3.1.13	<p>a. Shall, for Center-level acquisitions, upon the Proc Officer's determination of the acquisition-specific SSA appointment (if not retained by the Proc Officer or by default the Proc Officer), prepare an SSA appointment memorandum utilizing an approved procurement template and route, at a minimum, through the Proc OC and Office of the General Counsel Representative (hereafter referred to as "Legal Representative") Legal Representative, prior to routing through Proc OM, for Proc Officer approval.</p> <p><i>Note: In accordance with NFS 1801.603-1, the Senior Procurement Executive retains the authority to appoint the SSA for actions over \$500M.</i></p> <p>b. Shall, following appointment of an SSA, prepare an SEB Membership Appointment Memorandum utilizing an Agency template and route, at a minimum, through the Proc OC and</p>

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		Legal Representative, prior to routing through Proc OM, followed by Proc Officer, for SSA approval.
Recorder	5.3.1.14	<p>a. Shall obtain and retain in the official SEB file a copy of both the SSA and SEB membership appointment memoranda and any amendments thereto.</p> <p>b. Shall retain all SEB Member individual COI disclosures and the Office of the General Counsel's clearance recommendations in the SEB official records.</p> <p>c. Will, following formal appointment of an SEB, for all key SEB meetings/events:</p> <p>(1) Maintain a list of all attendees.</p> <p>(2) Take minutes.</p> <p>d. Will actively maintain and electronically file all official SEB records in accordance with <i>APPENDIX D - RECORDS</i>.</p>

### 5.3.2 Develop SEB Security Plan

Actionee		Action
SEB Chair	5.3.2.1	<p>a. Shall, utilizing an approved procurement template and in coordination with the SSO Advisor, prepare a security plan to document the methods the SEB will follow to ensure SEB security.</p> <p>b. Will provide all SEB Members with a security briefing utilizing approved procurement briefing charts and brief all SEB Members on the acquisition-specific SEB security plan.</p>
SEB Members	5.3.2.2	<p>Following the SEB Chair's security presentation:</p> <p>a. Will read the full contents of the SEB security plan and seek clarification from the SEB Chair for any aspect of the plan that is not fully understood.</p> <p>b. Shall sign the SEB security plan after its contents are fully understood and the member agrees to follow the plan.</p>
Recorder	5.3.2.3	Shall retain the SEB member-signed security plan in the SEB official records.

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### 5.3.3 Brief the SEB

Actionee		Action
Legal Representative	5.3.3.1	Will brief the SEB Members on “Ethics and Procurement Integrity.”  <i>Note: If any SEB Evaluators envisioned to be appointed under 5.4.23 are available to attend this briefing, it should be considered in an effort to minimize (or eliminate) the need for a second briefing on this subject.</i>
Office of Inspector General	5.3.3.2	Will brief the SEB members on “Acquisition Integrity.”  <i>Note: If any SEB Evaluators envisioned to be appointed under 5.4.23 are available to attend this briefing, it should be considered in an effort to minimize (or eliminate) the need for a second briefing on this subject. The SEB Chair may arrange for the briefing by contacting the Inspector General Office of Program Assistance at (256) 544-9188.</i>
SSO Advisor	5.3.3.3	Will provide an overview of the SEB process and inform SEB Members of the latest SSO procedural developments or policy changes that may impact the acquisition.
Recorder	5.3.3.4	Will brief SEB Members on SSO online resources as well the SSO/SEB filing system to maintain overall document control in alignment with the security plan.

### 5.3.4 Transfer from RDT to SEB

Actionee		Action
SEB Members	5.3.4.1	a. Should begin SEB activities following all clearances and instructional/security briefings.  <i>Note: While SEB Member activities officially begin at 5.3.4, SEB personnel are encouraged, if available and cleared/appointed prior to the RDT concluding DRFP activities, to attend 5.2.9 activities in an observer-only role in order to reduce their learning curve in advance of 5.3.4.2.</i>  b. Shall, in accordance with MPR 3600.2, charge all labor associated with SEB activities to their regular labor codes.
RDT Members	5.3.4.2	a. Will, utilizing an approved procurement template, conduct a joint “kickoff” meeting with the Req Org, Proc



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		<p>OC, SSO Advisor, and the SEB in order to officially transfer RDT responsibilities to the SEB.</p> <p>b. Will provide the draft solicitation and an overview of the PSM Briefing Charts and PSM Minutes to the SEB in order to ensure a complete understanding of the acquisition strategy by the SEB.</p> <p>c. Will provide all other remaining RDT records to the SEB.</p>
SEB Members	5.3.4.3	Will take receipt of all RDT records supplied to the SEB.
RDT Members	5.3.4.4	<p>a. Will dispose of excess RDT documentation in accordance with Appendix D.</p> <p>b. Will, if final RDT effort resided in a SSO secure area, complete any housekeeping efforts necessary to finalize transfer of RDT effort to SEB.</p> <p>c. Will conclude RDT activities.</p>
SEB Members	5.3.4.5	<p>a. Will independently review and discuss the PSM Briefing Charts and PSM Minutes to affirm uniform SEB familiarity with the scope of the acquisition, to include all aspects of the initial risk assessment and resultant procurement strategy.</p> <p>b. Will review the acquisition's PSM-established SEB schedule for accomplishing the acquisition.</p> <p><i>Note: See Appendix H.2 for sample SEB process flow charts.</i></p>
SEB Chair	5.3.4.6	<p>a. Shall promptly notify in writing, the SSO Advisor, Proc OC, Proc OM, and SSO OM, any time the SEB determines the schedule for the remainder of the SEB acquisition to be unrealistic.</p> <p>b. Will ensure the notification includes rationale supporting the schedule change.</p> <p><i>Note: Written notification may include secure email communications utilizing NASA's current encryption software.</i></p> <p>c. Will coordinate with the SSO OM and SSO Scheduler on the number of additional days necessary to complete the acquisition.</p>

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Proc OM SSO OM	5.3.4.7	<p>a. Will confer on requests to deviate from the approved SEB schedule.</p> <p>b. Will apprise the Proc Officer, Req Org Director, and MSFC senior management accordingly if a significant schedule risk exists that cannot be reasonably mitigated.</p> <p>c. Will, in coordination with the Proc Officer, approve any extension to the acquisition schedule when warranted.</p>
Proc Mbr	5.3.4.8	Will report progress against the acquisition baseline schedule to the SSO Scheduler, at a minimum, on a monthly basis.
SEB Chair	5.3.4.9	Should offer progress reviews to the Proc OM, SSO OM, and Req Org Director (or designee), at a minimum, every two months from the establishment of the SEB through award of the acquisition.
Req Org	5.3.4.10	Will advise the SEB Chair, Proc OC, Proc OM, and SSO OM of any changes to the requirement that could cause a change in SEB's approach, from establishment of the SEB through award of the acquisition.

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#### 5.4 Completion and Issuance of Solicitation

##### 5.4.1 Implement Risk Mitigation

Actionee		Action
SEB Members		<p>a. Will, using the PSM risk assessment, implement risk mitigation during DRFP refinement and remain mindful of issues that may eventually impact selection or that are of special importance/criticality during subsequent contract performance.</p> <p><i>Note: The PSM risk assessment additionally serves to assist SEB Members in defining aspects of the solicitation's Section L instructions to offerors and Section M for shaping evaluation factors/subfactors.</i></p> <p>b. Will review and ensure all acquisition package approval/deviation requests have been received/approved.</p> <p>c. Will, for any approval/deviation requests that were denied, refine the acquisition package and implement risk mitigation where applicable.</p>

##### 5.4.2 Refine DRFP Solicitation Package Sections A through K, and Create Cover Letter

Actionee		Action
SEB Members		<p>a. Will review the RDT's acquisition package to determine completeness and suitability for the acquisition relative to Sections A through K.</p> <p><i>Note: To a certain degree, minor revisions to this portion of the acquisition package are expected. Rework may require meetings with representatives of the Req Org. When elements of this portion of the acquisition package are so deficient as to require a major revision, or should a complete rewrite be necessary based on changes in requirements, the SEB will report a schedule impact and the SEB schedule risk identified.</i></p> <p>b. Shall refine and complete the Sections A through K of the model contract, commonly consisting of (but not all inclusive):</p> <p>(1) Base model contract, to include SF 33 for Section A, through all terms and conditions/clauses in Section I.</p>

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		<p>(2) PWS (normally Attachment J-1 of the solicitation).</p> <p>(a) Performance specifications.</p> <p>(b) Quality assurance requirements.</p> <p>(c) Special requirements (e.g., security information technology, data rights).</p> <p>(d) WBS (i.e., the numbered structure of PWS).</p> <p>(3) DPD (normally Attachment J-2 of the solicitation).</p> <p>(4) Supplemental Section J attachments to model contract.</p> <p>(a) Small Business Subcontracting Plan.</p> <p>(b) IT Security Management Plan</p> <p>(c) Government Surveillance Plan.</p> <p>(d) PRS.</p> <p>(e) IDIQ Rates.</p> <p>(f) IDIQ Task Order Flow Process.</p> <p>(g) IDIQ Task Order Summary.</p> <p>(h) Labor Category Descriptions.</p> <p>(i) Department of Labor Wage Determinations.</p> <p>(j) IAGP.</p> <p>(k) GFP.</p> <p>(l) Government Furnished Computer Software.</p> <p>(m) Government Provided Services.</p> <p>(n) PEP.</p> <p>(o) Applicable Documents.</p> <p>(p) Acronyms.</p>
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		(5) Section K.  c. Shall create a DRFP cover letter utilizing an Agency template, ensuring the narrative describes any unique or key aspects of the acquisition.
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#### 5.4.3 Develop DRFP Section M

*Note: Sections L and M of the solicitation constitute the instructions to offerors and the evaluation factors for award. While Section M generally describes how the Government will evaluate proposals, Section L generally describes what the Government wants to see in the proposals. While Section M is normally developed first, portions of Section L are often concurrently developed to ensure that information essential for an efficient and accurate proposal evaluation is requested, while also striving to avoid obtaining excessive information.*

Actionee	Action
SEB Members	<p>a. Shall complete DRFP Section M in accordance with FAR 15.203, 15.204, 15.304, NFS 1815.304, and by utilizing SSO-, PS10-, or Agency-provided provision templates when appropriate.</p> <p>b. Shall state the Government intends to make award without discussions.</p> <p><i>Note: While discussions may ultimately be determined necessary, this notice allows the Government to award to an offeror submitting a truly superior initial proposal that contains no deficiencies or significant weaknesses. Inclusion (as applicable) of FAR 52.215-1, Instructions to Offerors – Competitive Acquisition, satisfies this requirement as such notice is provided in paragraph (f)(4) of the provision.</i></p> <p>c. Should consider the unique aspects of the requirements when assigning the 1,000 point cumulative weighting of all Mission Suitability subfactors.</p> <p>d. Shall, at a minimum, define the Mission Suitability evaluation process the SEB will conduct, to include:</p> <p>(1) Considering the adequacy of the proposed approach to meeting the requirements, including any proposed resources (e.g., staffing approach for services acquisitions).</p> <p>(2) Assessing the offeror's SHE approach, either by requiring a general description or a more formal SHE plan</p>

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		<p>when employee safety risk is increased due to contract requirements.</p> <p><i>Note: Generally, the SEB evaluates the SHE approach and/or Plan as part of a technical or management approach subfactor and does not assign a discreet point value to this area.</i></p> <p>(3) When contracting on a basis for other than firm-fixed-price acquisitions (e.g., for cost reimbursement type acquisitions), notification to offerors that a lack of resource realism may adversely impact the Mission Suitability score and result in cost realism adjustments under the Cost factor (in accordance with NFS 1815.304 and 1815.305).</p> <p>e. Shall define the Past Performance evaluation process the SEB will utilize, at a minimum:</p> <p>(1) The rating system set forth in NFS 1815.305(a)(2).</p> <p>(2) Areas against which past performance relevancy will be evaluated (e.g., size, content, complexity, and if utilized, contract type).</p> <p>(3) A minimum size standard and, if desired, minimum standards for content and complexity.</p> <p>f. Shall define the Cost/Price evaluation process the SEB will utilize.</p> <p>g. Shall, in accordance with NFS 1815.305(a)(1)(B) for other than fixed price acquisitions, define the evaluation process the SEB will utilize to perform a probable cost analysis, to include:</p> <p>(1) Recommended additions or reductions in material, equipment, labor hours, direct rates, or indirect rates.</p> <p>(2) Identification of the differences between the probable cost and offerors' proposed costs regarding business methods, operating procedures, and practices as they affect cost.</p> <p>h. Shall, based on the unique aspects of the requirements, assign the relative importance of each of the three evaluation factors in accordance with FAR 15.304(e), relative to</p>
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		whether all evaluation factors other than Cost/Price, when combined, are significantly more important than Cost/Price; approximately equal to Cost/Price; or significantly less important than Cost/Price.
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#### 5.4.4 Develop DRFP Section L

*Note: Careful thought should be to preparation of solicitation instructions in order to facilitate an effective evaluation of proposals. For example, Mission Suitability volume requirements should reflect only meaningful discriminators. Past Performance thresholds (i.e., size, content, complexity) should reflect meaningful indicators of relevancy (e.g., for consideration of complexity, the number of computing devices maintained, diversity of customer base, scale of operations, diversity of labor types and skills, geographic dispersion).*

Actionee		Action
SEB Members	5.4.4.1	<p>a. Shall complete DRFP Section L in accordance with FAR 15.203 and 15.204, NFS 1815.2, and by utilizing SSO-, PS10-, or Agency-provided provision templates when appropriate.</p> <p>b. Shall, at a minimum, relative to Section L instructions for formatting page-limited volumes, establish clear proposal page limitations for both the offeror's Mission Suitability and Past Performance volumes in accordance with NFS 1815.204-70, with page limitations for each of these volumes always being an even number of pages (when the use of a hard copy submission as the official copy is considered appropriate).</p> <p><i>Note: Section L instructions may provide suggested guidelines within the overall page limitation for individual elements of the page-limited volumes (e.g., for the Mission Suitability Volume: Management Plan or Approach, Small Business Subcontracting Plan or Approach, SHE Plan or Approach may have suggested, non-binding, guidelines). Proposal submission page limits will be the maximum number of pages necessary to fully, yet succinctly, address all solicitation requirements as determined by SEB Members.</i></p> <p>c. Shall clearly establish a tentative due date and time for the receipt of proposals.</p>

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		<p><i>Note: Generally, receipt of proposals should be no later than 1:00 p.m. local time. When beneficial to the Government, the SEB may request (but not require) an earlier submission date for separate parts of the proposal (e.g., submission of the Past Performance Volume two weeks prior to the required receipt of proposal date).</i></p> <p>d. Will require all offerors and any proposed subcontractors to provide the Data Universal Numbering System (DUNS) number and Commercial and Government Entity (CAGE) code for each individual entity.</p> <p><i>Note: This information is provided as part of the transmittal letter required by the PS60 Section L Contract Instructions provision.</i></p> <p>e. Shall, in accordance with NFS 1815.304, include either a separate Small Business Utilization factor (i.e., Small Business Utilization Volume) or subfactor under the Mission Suitability Volume when the acquisition is not exclusively set aside for small businesses. Section L Small Business Utilization subfactor language may be obtained using a template available on the SSO Sharepoint site.</p> <p>f. In accordance with NFS 1815.304-70, for Section L instructions for the Mission Suitability Volume:</p> <p>(1) Shall limit the total number of subfactors to no more than five, with each subfactor's criteria structured to allow for a qualitative Section M evaluation of each subfactor's merits.</p> <p>(2) Will ensure the Mission Suitability subfactors and their supporting criteria narratives are complete, mutually acceptable, do not overlap, and do not conflict with other Mission Suitability subfactors and their respective supporting criteria.</p> <p>g. Shall, relative to Section L instructions for the offeror's Past Performance Volume, require the offeror to provide detailed information on a prescribed number of relevant contracts performed by the offeror and any subcontractors proposed to perform specific functions.</p> <p>h. Shall not request certified cost and pricing data in Section L instructions for the Cost/Price Volume when adequate</p>
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		<p>price competition is anticipated (in accordance with FAR 15.403-1).</p> <p>i. Will determine the full extent of the acquisition-related supporting documentation (i.e., refinement of background and historical information) to be provided in support of the acquisition.</p> <p><i>Note: This determination will include distinguishing what information will be provided with the posted solicitation and what information will be provided via alternate means (in accordance with 5.4.11).</i></p> <p>j. Will provide clear instructions in Section L relative to the specific acquisition-related supporting documentation that will be provided outside of the posted solicitation, to include instructions relative to where/how interested parties may obtain any supplemental acquisition-related supporting documentation deemed sensitive (e.g., via an online public electronic reading room or secure electronic repository).</p>
Proc OM	5.4.4.2	<p>Will, after conferring with SEB Members, the Proc OC, Legal Representative, SSO Advisor, and SSO OM, make a determination regarding the use of oral presentations from offerors to substitute for, or augment, portions of an offeror's written proposal prior to SEB Members incorporating those instructions into Section L of the DRFP.</p> <p><i>Note: In certain procurement situations, the use of oral presentations, in accordance with FAR 15.102, may be used in lieu of portions of written proposal information, such as when determined by SEB Members to be effective in streamlining the source selection process or when an opportunity for dialogue among the parties is desired by the SEB Members.</i></p>

#### 5.4.5 Develop Draft Source Evaluation Plan

Actionee		Action
SEB Members		<p>a. Shall, utilizing an approved procurement template, develop a draft Source Evaluation Plan, to include establishing an approach for evaluating relevant past performance in terms of size, content, complexity, and if utilized, contract type.</p> <p><i>Note: The draft Source Evaluation Plan does not accompany the DRFP during document review</i></p>

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		<p><i>procedures. The Source Evaluation Plan will be independently reviewed and approved following approval of the Request for Proposal (RFP).</i></p> <p>b. Will review any proposed deviations to the approved procurement Source Evaluation Plan template with the SSO Advisor.</p> <p>c. Will ensure the draft Source Evaluation Plan aligns with Section M of the DRFP.</p>
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#### 5.4.6 Synopsize DRFP Tentative Schedule on GPE

Actionee		Action
Proc Mbr		<p>a. Shall create a DRFP synopsis, to include, at a minimum, the following information:</p> <p>(1) The previously established solicitation number. This complete solicitation number will be utilized throughout the remainder of the GPE solicitation process.</p> <p>(2) Description of the acquisition.</p> <p>(3) Tentative schedule for release of the DRFP and RFP.</p> <p>(4) Plans for an Industry Day Briefing, to include tentative time and location, if known. The briefing normally occurs subsequent to release of the DRFP.</p> <p>(5) Tentative plans for a Preproposal Conference if anticipated to be a highly complex acquisition requiring a second industry session following release of the RFP.</p> <p>(6) Reference to any previous presolicitation notice posted on the GPE.</p> <p>(7) Point of contact for additional information.</p> <p>b. After review by, at a minimum, the Proc OC and Proc OM:</p> <p>(1) Will ensure a peer with commensurate GPE posting experience is available (as a second set of eyes) to confirm information to be uploaded on the GPE is accurate.</p> <p>(2) Shall post the DRFP synopsis on the GPE.</p>

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		(3) Shall, after posting the DRFP synopsis, amend any previously posted GPE notices to include a reference to the DRFP.
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#### 5.4.7 Complete SEB DRFP Document Review

Actionee		Action
SEB Members	5.4.7.1	Will, prior to submitting the DRFP and its applicable documents for document review procedures, at a minimum, ensure the documents satisfy all aspects of “Solicitation Review” in accordance with Appendix F.2.1.
Recorder SEB Chair	5.4.7.2	Will, in accordance with 5.9.1, ensure proper timelines are followed for initiating formal SEB document review procedures.  <i>Note: See Document Review Timelines for SEB DRFP IDR in accordance with Appendix E.1 and SEB Document Review Flow-Chart in accordance with Appendix E.3.</i>
SEB Chair	5.4.7.3	Shall, after SEB Members finalize the DRFP and its applicable documents, conduct SEB DRFP IDR in accordance with 5.9.2.
SEB Members	5.4.7.4	Prior to routing the DRFP and its applicable documents for the DRB:  a. Will, at a minimum, ensure the DRFP and its applicable documents satisfy all aspects of “Solicitation Review” in accordance with Appendix F.2.2.  b. Shall, utilizing an approved procurement template, develop DRFP briefing charts for use during the remainder of the DRFP document review procedures.  <i>Note: The DRFP briefing charts will provide a high-level overview of the acquisition and any salient points of the DRFP. The briefing charts should be presented by the SEB Chair at the onset of the tabletop reviews for the remainder of the document review procedures as an executive summary. These briefing charts are not intended for solicitation of DRB comments/edits. Following any refinements to these charts during the DRB, it is encouraged for Center Review Team (CRT) and SSA Executive Session document review procedures</i>

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		<i>that these briefing charts accompany the DRFP as an applicable document for informational purposes.</i>
		c. Should, concurrent with this step, conduct 5.4.88.
SEB Chair	5.4.7.5	Shall conduct SEB DRFP DRB in accordance with 5.9.3.
SEB Members	5.4.7.6	Will, prior to routing the DRFP and its applicable documents for CRT, at a minimum, ensure applicable documents satisfy all aspects of "Solicitation Review" in accordance with Appendix F.2.3.
SEB Chair	5.4.7.7	Shall conduct the CRT in accordance with 5.9.5.
SEB Members	5.4.7.8	Will, prior to routing the DRFP and its applicable documents to obtain SSA approval, ensure all CRT comments have been dispositioned and the DRFP finalized accordingly.
SEB Chair	5.4.7.9	Shall obtain SSA approval to release the DRFP on the GPE in accordance with 5.9.6.  <i>Note: In accordance with NFS 1815.303, the SSA provides approval for the source selection approach, rating method, evaluation factors, subfactors, the weight of the evaluation factors and subfactors when used, and any special standards of responsibility (in accordance with FAR 9.104-2) before release of the DRFP.</i>

#### 5.4.8 Make Industry Day Arrangements and Develop Industry Day Briefing Charts

*Note: It is MSFC's practice that SEB's conduct an Industry Day Briefing (i.e., a presolicitation conference) for the purpose of exchanging information with industry in order to improve industry's understanding of Government requirements. Industry Day may additionally include applicable MSFC/MAF site tours. When on-site briefings are not feasible or desired, virtual presentations may be provided, or the charts may be posted to the GPE.*

Actionee		Action
SEB Members	5.4.8.1	<p>a. Will prepare Industry Day Briefing Charts utilizing an approved procurement template.</p> <p><i>Note: The SEB should consider viewing Industry Day Briefing Charts from other recent acquisitions to help facilitate preparation.</i></p> <p>b. Should, at a minimum, consider following a basic Industry Day Briefing agenda to include:</p> <p>(1) Introductory remarks by the Proc Officer, Req Org Director, or other notable senior designee.</p>

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		<p>(2) A general description of the acquisition.</p> <p>(3) An overview of the proposal evaluation process.</p> <p>(4) A more in-depth technical description of the requirements presented by a knowledgeable individual (usually from the Req Org), using visual aids to ensure a comprehensive understanding.</p> <p>(5) Key solicitation instructions for which non-compliance could result in adverse impact to the proposal evaluation (e.g., font and page limit restrictions).</p> <p>(6) Answering, as part of the presentation, any written questions received prior to the briefing.</p> <p>(7) Expressing the opportunity and process for industry to continue submitting written questions/comments for the Government's consideration in developing the RFP.</p> <p>(8) Closing remarks by the Proc Officer, Req Org Director, or other notable senior designee, to include reminding all attendees that following the release of the solicitation, contact is to be made through the person identified in the RFP, and that all data presented during the Industry Day Briefing will be posted on the GPE by the following week.</p> <p>(9) Conducting an applicable site tour.</p> <p>c. Will consider involving the following subject matter experts (SMEs) to assist in presenting portions of the Industry Day Briefing relative to their areas of expertise:</p> <p>(1) Cost/Price Analysts.</p> <p>(2) SBS.</p> <p>(3) Industrial Labor Relations Representative.</p> <p>(4) Property Representative.</p> <p>(5) SMA Representative.</p> <p>(6) Office of Chief Information Officer (OCIO) (IS01) Representative (hereafter referred to as "OCIO Representative").</p>
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		<p>(7) Supplemental SMEs.</p> <p>d. Should consider making the following preparations for conducting an Industry Day:</p> <p>(1) For an onsite Industry Day Briefing, make reservations for use of onsite accommodations suitable for the event.</p> <p>(2) For an onsite Industry Day Briefing or any site tours, make arrangements for security support, to include clearing and registering attendees, and establishing any special parking arrangements.</p> <p><i>Note: The use of Eventbrite (<a href="https://www.eventbrite.com">https://www.eventbrite.com</a>) has proven to be an effective means of registering interested parties for activities such as Industry Day. Microsoft Teams may also be utilized to conduct this briefing, subject to participant limitations.</i></p> <p>(3) For an offsite Industry Day Briefing, make reservations at a neutral (i.e., non-industry/acquisition controlled) event site suitable for the event.</p> <p>(4) Make arrangements for visual aid equipment and services.</p> <p>(5) Make arrangements for distributing all handout material.</p> <p>(6) Make arrangements for audio or visual recording of the event.</p> <p><i>Note: Recording of the event is not required. Recordings can serve as an additional resource supplied to interested parties, such as potential offerors that were unable to attend the event.</i></p> <p>(7) Make arrangements for a receptionist to support the Industry Day Briefing event location, to include utilizing a log to capture the registration/attendance of all attendees for both industry and Government personnel.</p> <p>(8) Make arrangements for group transportation for site tours, if applicable.</p>
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		(9) Make arrangements for SMEs to provide a scripted overview of the facilities to be toured by industry representatives.
Req Org Proc OC SEB Chair Proc Mbr	5.4.8.2	Will determine:  a. The SMEs necessary to participate as presenters during the Industry Day Briefing.  b. The SMEs necessary to provide narrative support during any site tours.
SEB Members	5.4.8.3	a. Will coordinate with the applicable Industry Day Briefing SME presenters to incorporate their planned content into the overall Industry Day Briefing Charts.  b. Will make arrangements to ensure all Industry Day Briefing SME presenters are available for the desired date/time/location.  c. Will make arrangements to ensure all Industry Day SME site tour narrators are available for the desired date/time/location.  d. Will, after review by, at a minimum, the Proc OC and Proc OM, and Legal Representative, finalize the Industry Day Briefing Charts.

#### 5.4.9 Post DRFP on GPE

Actionee		Action
Proc Mbr		a. Will, prior to posting any information on the GPE, ensure:  (1) All documents comprising the DRFP are free of hidden comments, Extensible Markup Language (usually referred to as "XML") data, editorial changes and any other historical metadata. The Agency Electronic Document Posting Checklist template should be utilized to assist in performing this review.  (2) A peer with commensurate GPE posting experience is available (as a second set of eyes) to confirm information to be uploaded on the GPE is accurate.  (3) The Sensitive But Unclassified (SBU) cover page used for internal review is deleted prior to posting.

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		<p>b. Shall post the DRFP on the GPE following SSA approval.</p> <p><i>Note: Posting of the DRFP on the GPE invites comments from industry on all aspects of the draft solicitation, including the requirements, schedule, proposal instructions, and evaluation approach (in accordance with NFS 1815.201).</i></p>
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#### 5.4.10 Provide Industry Access to Acquisition-Related Supporting Documentation

Actionee		Action
SEB Members  Req Org		<p>a. Shall, in accordance with FAR 3.104 and 15.201, ensure that any exchange of information between the Government and industry is consistent with procurement integrity requirements.</p> <p>b. Will provide industry access to any Government-owned studies or documentation (either Government or contractor-generated) related to the requirements of the acquisition as early as practicable.</p> <p><i>Note: Whether documents are determined to be Scientific and Technical Information (STI) or non-STI in nature, ensure adequate time for document reviews and approvals prior to the release/posting of all acquisition-related supporting documentation.</i></p> <p>c. Will ensure any Government-owned studies or documentation qualifying as STI adheres to requirements for documentation, approval, and dissemination in accordance with NPR 2200.2.</p> <p>d. Will thoroughly review non-STI documents not available to the general public and refer questions regarding sensitivity (e.g., restrictive legends) to the appropriate technical personnel as well as the Office of the General Counsel for assistance with resolution prior to release.</p> <p>e. Will, after appropriate determinations are made regarding the sensitivity of all supporting documentation, limit the access of any acquisition-related supporting documentation deemed to be sensitive to direct requests from interested parties via controlled electronic delivery.</p>



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		f. Will, prior to providing industry access to any Government-owned studies or documentation, ensure a peer is available (as a second set of eyes) to confirm information being uploaded or provided is accurate.
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#### 5.4.11 Conduct Industry Day

Actionee		Action
SEB Members	5.4.11.1	Will conduct the Industry Day Briefing and any planned site tours.
Industry Day Briefing SMEs		
Proc Mbr	5.4.11.2	<p>a. Will, during the Industry Day Briefing:</p> <p>(1) Accept Industry Day Briefing questions/comments in writing from industry.</p> <p>(2) Convey that the Government intends to take industry questions/comments into consideration when finalizing the RFP.</p> <p><i>Note: It is generally not recommended that acquisition-specific questions/comments be responded to by the SEB Members or SMEs directly at the Industry Day Briefing unless ample time has been afforded to ensure the entire Government team can carefully weigh and correctly respond to industry's questions/comments.</i></p> <p>b. Following the Industry Day Briefing:</p> <p>(1) Will ensure a peer with commensurate GPE posting experience is available (as a second set of eyes) to confirm information to be uploaded on the GPE is accurate.</p> <p>(2) Will post all charts and any supplemental information presented at the Industry Day Briefing or during the site tours on the GPE.</p>

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#### 5.4.12 Develop RFP and Cover Letter

Actionee		Action
SEB Members		<p>a. Shall modify the DRFP as a result of any corrections identified by the Government after issuance of the DRFP, to include updating solicitation clauses and provisions.</p> <p>b. Should consider further modifying the DRFP as a result of industry questions/comments received in response to the Industry Day Briefing and the GPE posted DRFP.</p> <p>c. Will review and finalize the due date and time for the receipt of proposals, as well as the date desired for any portion of the proposal requested prior to the receipt of proposal due date.</p> <p>d. Shall, utilizing an approved procurement template, create a summary change table of all substantive changes made to the DRFP in developing the RFP.</p> <p><i>Note: As part of the summary change table, the SEB may provide answers to Industry questions submitted in response to the DRFP. At a minimum, the summary change table reflecting the substantive changes to the solicitation will be included as an attachment to the eventual RFP cover letter as part of the RFP posted on the GPE.</i></p> <p>e. Shall create an RFP cover letter utilizing an Agency template, ensuring the narrative clearly articulates any distinctions unique to the acquisition.</p> <p>f. Will ensure that the planned publication notice at 5.4.16 and response time in the RFP comply with FAR 5.203.</p>

#### 5.4.13 Finalize IGCE

Actionee		Action
Req Org Resource Analyst		<p>a. Will, prior to release of the RFP, conduct a thorough review, refinement, and adoption of a final IGCE that reflects the Government's best estimate of the cost/price necessary to obtain the required supply/product or service.</p> <p>b. Will be prepared to discuss the final IGCE during the RFP document review procedures.</p>
Cost/Price Analyst		
SEB Members		

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#### 5.4.14 Develop RFP Briefing Charts

Actionee		Action
SEB Members		<p>Will, utilizing the DRFP briefing charts developed in 5.4.7.4(b) as a starting point, develop RFP briefing charts as follows:</p> <ul style="list-style-type: none"> <li>a. Provide a high-level overview of the acquisition, with a summary status of changes made to any salient points of the acquisition.</li> <li>b. Provide a secondary/detailed description of all substantive changes made between the DRFP release and RFP.</li> </ul> <p><i>Note: The RFP briefing charts should be presented by the SEB Chair at the onset of all tabletop reviews for all RFP document review procedures as an applicable document for informational purposes only (with the SEB to make any refinements to these charts following each step of the RFP document review procedures preceding SSA approval of the RFP). These briefing charts are not intended for solicitation of comments/edits during the IDR or DRB document review cycles.</i></p>

#### 5.4.15 Arrange for Preproposal Conference

*Note: A Preproposal Conference is uncommon if the SEB held an Industry Day Briefing and if significant changes have not been made between the DRFP and RFP release. Conversely, a preproposal conference should be considered if circumstances exist after release of the RFP that cannot be reasonably addressed in an amendment to the RFP, or if the solicitation is of significant technical complexity to warrant additional interaction with industry.*

Actionee		Action
Proc Mbr		<ul style="list-style-type: none"> <li>a. Will make the necessary arrangements for a Preproposal Conference in accordance with arrangements made for the Industry Day Briefing at 5.4.8 if the SEB Members and Proc OM agree that either of the following exist: <ul style="list-style-type: none"> <li>(1) The acquisition requires a second industry session following release of the RFP based on the complexity of the acquisition.</li> <li>(2) Significant changes were made between the DRFP release and RFP that warrant a second industry session (e.g.,</li> </ul> </li> </ul>

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		<p>if either the requirements or proposal evaluation process has changed significantly).</p> <p>b. Will, if a Preproposal Conference is determined to be necessary, include the appropriate NFS 1852.215-77 preproposal conference provision in the RFP.</p>
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#### 5.4.16 Synopsise RFP on GPE

Actionee		Action
Proc Mbr		<p>Prior to starting the RFP document review procedures:</p> <p>a. Will ensure a peer with commensurate GPE posting experience is available (as a second set of eyes) to confirm information to be uploaded on the GPE is accurate.</p> <p>b. Shall synopsise the RFP (with a reference to the previous draft synopsis) on the GPE, providing the anticipated RFP release date, in accordance with FAR 5.201 and 5.203.</p>

#### 5.4.17 Develop Procurement Sensitivity Letter

Proc Mbr		<p>a. Shall, utilizing an Agency template, prepare a procurement sensitivity letter (commonly known as a “blackout notice”) for eventual issuance by the Proc Officer.</p> <p>b. Shall, at a minimum, include in the sensitivity letter:</p> <p>(1) A member of the Office of Procurement (normally the Proc Mbr) as the official point of contact for all correspondence relating to the procurement.</p> <p>(2) A notice that the MSFC Office of Procurement has issued the RFP and a prohibition for any future discussions with industry representatives regarding the procurement action.</p> <p>(3) A web address/link to the exact RFP site on <a href="https://beta.sam.gov/">https://beta.sam.gov/</a>.</p> <p>c. Shall, at a minimum, have the procurement sensitivity letter reviewed by the Proc OC and Proc OM prior to eventual tendering to the Proc Officer for approval and issuance.</p>
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#### 5.4.18 Complete RFP Document Review

Actionee		Action
SEB Members	5.4.18.1	Will, prior to submitting the RFP and its applicable documents for document review procedures, at a minimum, ensure changes made to any of the documents between DRFP release and development of the RFP satisfy all aspects of "Solicitation Review" in accordance with Appendix F.2.1.
Recorder SEB Chair	5.4.18.2	Will, in accordance with 5.9.1, ensure proper timelines are followed for initiating formal SEB document review procedures.  <i>Note: See Document Review Timelines for SEB RFP IDR in accordance with Appendix E.1 and SEB Document Review Flow-Chart in accordance with Appendix E.3.</i>
SEB Chair	5.4.18.3	Shall, after SEB Members finalize the RFP and its applicable documents, conduct SEB RFP IDR in accordance with 5.9.2.
SEB Members	5.4.18.4	Will, prior to routing the RFP and its applicable documents for the DRB, at a minimum, ensure the RFP and its applicable documents satisfy all aspects of "Solicitation Review" in accordance with Appendix F.2.2.
SEB Chair	5.4.18.5	Shall conduct SEB RFP DRB in accordance with 5.9.3.
SEB Members	5.4.18.6	Will, prior to routing the RFP and its applicable documents for the CRT, at a minimum, ensure the RFP and its applicable documents satisfy all aspects of "Solicitation Review" in accordance with Appendix F.2.3.
SEB Chair	5.4.18.7	Shall conduct the CRT in accordance with 5.9.5.
SEB Members	5.4.18.8	Will, prior to routing the RFP and its applicable documents to obtain SSA approval, ensure all CRT comments have been dispositioned and the RFP is finalized accordingly.
SEB Chair	5.4.18.9	Shall obtain SSA approval to release the RFP on the GPE in accordance 5.9.6.

#### 5.4.19 Post RFP on GPE and Issue Procurement Sensitivity Letter

Actionee		Action
Proc Mbr	5.4.19.1	a. Will ensure all documents comprising the RFP are free of hidden comments, XML data, editorial changes, and any other historical metadata prior to posting the solicitation on the GPE. The Agency Electronic Document Posting Checklist template should be utilized to assist in performing this review.

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		<p>b. Will provide the procurement sensitivity letter to the Proc Officer.</p> <p>c. Will ensure a peer with commensurate GPE posting experience is available (as a second set of eyes) to confirm information to be uploaded on the GPE is accurate.</p> <p>d. Will ensure that the SBU cover page used for internal review is deleted prior to posting.</p> <p>e. Shall post the RFP on the GPE following SSA approval.</p>
Proc Officer	5.4.19.2	<p>a. Shall issue the procurement sensitivity letter in conjunction with the RFP release.</p> <p>b. Will coordinate distribution of the procurement sensitivity letter with CS20 Office of Communications for electronic dissemination to all Center employees and contractor personnel.</p>

#### 5.4.20 Finalize Source Evaluation Plan

Actionee		Action
SEB Members	5.4.20.1	Will review and finalize the Source Evaluation Plan, ensuring it aligns with the evaluation process defined in Section M of the RFP.
Proc Mbr Recorder	5.4.20.2	Shall route the Source Evaluation Plan, at a minimum, through the Proc OC, SSO Advisor, and Legal Representative, prior to routing through Proc OM and Proc Officer, for final approval by the SSA.

#### 5.4.21 Conduct Preproposal Conference and Receive Industry Questions (when applicable)

Actionee		Action
SEB Members  Preproposal Conference Briefing SMEs	5.4.21.1	Will conduct the Preproposal Conference in conjunction with any SMEs considered necessary to discuss pertinent issues in accordance with the notice provided in the RFP.
Proc Mbr	5.4.21.2	<p>a. Will ensure a peer with commensurate GPE posting experience is available (as a second set of eyes) to confirm information to be uploaded on the GPE is accurate</p> <p>b. Will post all charts and supplemental information presented at the Preproposal Conference on the GPE.</p>

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		c. Will be the point of contact for industry questions/comments.
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#### 5.4.22 Post RFP Amendment(s) on GPE

Actionee		Action
Proc Mbr		<p>a. Will, in response to industry questions/comments submitted subsequent to RFP release, incorporate written responses via formal amendment(s) to the RFP.</p> <p>b. Shall prepare formal amendment(s) if the Government changes its requirements or if any terms and conditions of the RFP change during the solicitation period.</p> <p>c. For any formal amendment(s), after the Proc OC, SSO Advisor, Legal Representative, and Proc OM perform a formal review and have provided their concurrence:</p> <p>(1) Will ensure a peer with commensurate GPE posting experience is available (as a second set of eyes) to confirm information to be uploaded on the GPE is accurate.</p> <p>(2) Shall post any formal amendment(s) to the RFP on the GPE.</p>

#### 5.4.23 Select and Appoint SEB Evaluators

Actionee		Action
Req Org Director (or designee)	5.4.23.1	Will develop a list of SEB Evaluator candidates for the acquisition and provide to the SEB Chair.
Req Org		
SEB Chair	5.4.23.2	<p>a. Will, as appropriate, appoint all other persons who will assist with proposal evaluation.</p> <p><i>Note: It is not required to appoint SSO Advisors or standing SEB SMEs. A list of standing SEB SMEs will be provided to the SEB Chair upon request from their SSO Advisor.</i></p> <p>b. Should seek to appoint permanent NASA employees as SEB Evaluators (hereafter referred to as "Evaluators").</p> <p>c. Shall limit Evaluators to a maximum of twenty individuals unless the NASA HQ Assistant Administrator for</p>

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		<p>Procurement approves a higher number in accordance with NFS 1815.370(d)(6).</p> <p>d. Will inform all Evaluator candidates of expectations when accepting a special assignment to support an SEB activity, to include alignment of individual work schedules/hours necessary to satisfy a standard SEB procurement schedule in accordance with MGM 3600.1, Chapter 1.</p> <p>e. Will update the source list (post Industry Day Briefing participants) and provide to all persons who are considered final candidates to serve as Evaluators on the SEB.</p>
Recorder	5.4.23.3	Will provide the source list and final list of SEB members (including Evaluators candidates) to the Office of the General Counsel for assistance in identifying potential COIs.
SEB Evaluator Candidates	5.4.23.4	Shall, utilizing an approved procurement template, prepare an individual COI disclosure based upon the source list, and prepare the applicable Office of Government Ethics clearance form as instructed by the Office of General Counsel upon individual Evaluator nomination.
SEB Chair	5.4.23.5	Will ensure Evaluator candidates are not provided access to any sensitive SEB material until the Office of the General Counsel clears the candidate and all of their executed forms/certificates are on file.
SEB Chair Recorder	5.4.23.6	Shall, after verification of no potential COIs for Evaluator candidates, prepare an Evaluator appointment memorandum utilizing an approved procurement template.
Recorder	5.4.23.7	<p>a. Shall obtain and retain in the official SEB file a copy of both the Evaluators appointment memoranda and any amendments thereto.</p> <p>b. Shall retain all Evaluators individual COI disclosures and Office of the General Counsel recommendations for clearance in the SEB official records.</p>
SEB Chair	5.4.23.8	<p>a. Will organize the SEB Voting Members and any Evaluators into SEB Committees in accordance with NFS 1815.370(d) to ensure the overall requirements of NFS 1815.3 are met.</p> <p><i>Note: Regardless of how the SEB is organized, all SEB voting members have equal status as rating officials.</i></p> <p>b. Should, when the SEB alone cannot meet all evaluation requirements, appoint individual Evaluators to assist the SEB</p>



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		Voting Members when the use of SEB Committees is not deemed necessary by the SEB Chair.
Recorder	5.4.23.9	<p>a. Shall maintain the official file copies of all Evaluator appointments.</p> <p>b. Will develop a list of all SEB Members and Evaluators reflecting each employee's name, organization (as shown on the Center Human Resources Services Office record), and position or function on an SEB Committee or if assisting an SEB Voting Member's evaluation.</p>

#### 5.4.24 Brief Evaluators on SEB Security and the Evaluation Process

Actionee		Action
Legal Representative	5.4.24.1	Will, if Evaluators were not in attendance at 5.3.3 (in advance of their formal appointment), provide an oral or written brief to Evaluators on "Ethics and Procurement Integrity."
SEB Chair or SSO Advisor	5.4.24.2	Will provide all Evaluators with a security briefing utilizing approved procurement briefing charts and the acquisition-specific SEB security plan.
SEB Evaluators	5.4.24.3	<p>Following the SEB Chair's security briefing presentation:</p> <p>a. Will read the full contents of the SEB security plan and seek clarification from the SEB Chair for any aspect of the plan that is not fully understood.</p> <p>b. Shall sign the SEB security plan after its contents are fully understood and the evaluator agrees to follow the plan.</p>
SEB Chair	5.4.24.4	Will provide an overview of the acquisition and the Source Evaluation Plan to all Evaluators and convey any expectations and instructions.
SEB Evaluators	5.4.24.5	<p>a. Will, following the SEB Chair's overview of the Source Evaluation Plan, read the full contents of the Source Evaluation Plan and seek clarification from the SEB Chair for any aspect of the plan that is not fully understood.</p> <p>b. Will, in order to facilitate a thorough evaluation of proposals, review the solicitation in its entirety to become familiar with the document's contents, in particular the instructions regarding proposal preparation (i.e., Section L) and method of evaluation (i.e., Section M).</p>
SSO Advisor	5.4.24.6	Will provide an overview of the remainder of the SEB process with the goal of affording Evaluators a better understanding of their key activities, provide answers to

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SEB Chair Proc Mbr		questions concerning the SEB process, and reinforce the need for SEB security.
SEB Chair	5.4.24.7	Will provide any required supplemental instructions to the SEB Committees (e.g., setting forth the objectives of each phase of the evaluation, the preferred method of proposal evaluation, and the documentation desired by the SEB at the completion of each phase).

#### 5.4.25 Train SEB Members and Evaluators in the SSO Electronic Evaluation System

Actionee		Action
SSO Advisor	5.4.25.1	<p>a. Will provide training to SEB Voting Members and Evaluators relative to writing proposal findings in accordance with SSO procedures.</p> <p>b. Will provide training on SSO electronic evaluation systems, tools, processes, and procedures relative to gathering, tracking, sorting, and reporting findings.</p>
Recorder	5.4.25.2	Will brief Evaluators on SSO online resources as well the SSO/SEB filing system to maintain overall document control in alignment with the security plan.

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## 5.5 Initial Proposal Evaluation

### 5.5.1 Receive and Log Proposals

Actionee		Action
SEB Members  Proc Mbr	5.5.1.1	<p>a. Shall, for proposals hand-delivered by offerors, execute a receipt document, utilizing an approved procurement template, indicating the date and time of each proposal receipt, providing a copy of the receipt to the offerors submitting the proposal, and retaining the original receipt for the SEB record.</p> <p>b. Will, for proposals physically delivered by any other means than hand-delivered by an offeror, note the date and time of each proposal's receipt, ideally relative to when the Government was first in possession of the proposal.</p> <p><i>Note: If available, retain the proposal's envelope, wrapper, or other evidence of date of receipt (e.g., delivery by commercial carrier).</i></p> <p>c. Will, where applicable for physical deliveries, provide the Recorder the original proposal receipt and note the requisite information on the SEB Security Plan's Proposal Receipt Log.</p> <p>d. Shall process any proposal received after the noted Section L due date for receipt of proposals as a "late" proposal in accordance with FAR 15.208 in coordination with, at a minimum, the Proc OC, Proc OM, SSO Advisor, SSO OM, and Legal Representative.</p> <p>e. Will, if applicable, utilizing an approved procurement template, develop letters notifying offerors of late proposal material and route letters for approval as a group. Letters will be reviewed, at a minimum, by the Proc OC and Legal Representative, prior to being tendered to the Proc OM for approval.</p> <p>f. Will, as applicable for any proposals physically received, uniquely mark and number all copies, including any accompanying physical electronic media such as compact discs or portable memory drives, in accordance with the SEB Security Plan's documentation control procedures.</p>

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		<p>g. Will electronically scan each Universal Service Bus (USB) for viruses prior to insertion into Government information technology (IT) systems.</p> <p>h. Will, as applicable for any proposals physically received, maintain security and accountability of proposals in accordance with the SEB Security Plan, including any accompanying physical electronic media, from proposal receipt until the SEB officially disbands.</p> <p>i. Will, for proposals submitted via Large File Transfer or other electronic means, ensure that all files indicated by the offeror as having been submitted were received, and transfer all files to the SharePoint electronic database.</p> <p>j. Will revise the source list based on all offers received and provide a copy to the Recorder to send to the Office of the General Counsel for a final assessment of potential COIs.</p>
SEB Members  SEB Evaluators	5.5.1.2	<p>a. Will review the source list to ensure no COIs exist prior to taking any further actions involving any proposals received and annotate individual COI disclosures accordingly.</p> <p>b. Will treat the names of offerors (including any proposed subcontractors) and the number of proposals received as source selection sensitive information.</p> <p>c. Will not release the names of offerors or the number of proposals received, except:</p> <p>(1) When completing the instructions in this MWI in accordance with 5.5.4.</p> <p>(2) By specific authorization of the Proc Officer.</p>

#### 5.5.2 Count Proposal Pages and Conduct Overview of Proposals

Actionee		Action
SEB Members	5.5.2.1	<p>a. Will examine the proposals to determine if they are essentially complete and do not exceed the established RFP page limitations for page-limited volumes.</p> <p>b. Will conduct a page-by-page review of each proposal volume to ensure compliance with solicitation instructions and to ensure all proposal copies contain an identical number</p>

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		<p>of pages and document this review utilizing an approved procurement template.</p> <p>c. Will include a review and comparison of all documents submitted to identify and document any discrepancies.</p> <p>d. Will ensure that any insertions resulting from submissions directly from any proposed subcontractors comply with page limitation instructions (e.g., proprietary salary/wage or health and welfare rate data) for any page-limited volume.</p> <p>e. Will, after a preliminary review, notify the Proc OC, SSO Advisor, and Legal Representative of any noted missing proposal material or page count violations for page-limited proposal volumes and document accordingly.</p> <p>f. Will notify the Proc OC, Proc OM, SSO Advisor, SSO OM, and Legal Representative for recommended disposition of any proposal that the SEB considers to be unacceptable and document accordingly.</p> <p>g. Will notify the Proc OC, Proc OM, SSO Advisor, SSO OM, and Legal Representative if the SEB receives only one proposal in response to the RFP and proceed in accordance with NFS 1815.305-71.</p> <p><i>Note: This also applies when the number of proposals received equals the number of awards contemplated, or during initial evaluation of proposals it is determined that only one acceptable proposal is received.</i></p>
Proc Mbr	5.5.2.2	<p>a. Will, if applicable, utilizing an approved procurement template, develop letters notifying offerors of missing proposal material or page limitation violations and route letters for approval as a group.</p> <p>b. Letters will be reviewed, at a minimum, by the Proc OC and Legal Representative, prior to being tendered to the Proc OM for approval.</p>
Proc OM	5.5.2.3	<p>a. Will, if applicable, review the missing proposal material/page limitation violations letters.</p> <p>b. Should consider coordination with the Legal Representative if any changes are made prior to approving.</p>

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Proc Mbr	5.5.2.4	Will, if applicable, in coordination with the Recorder:  a. Prior to issuing any communications to an offeror (regardless of the method of delivery, be it email, direct mailing, or any other alternate means), ensure a peer is available (as a second set of eyes) to confirm information being sent is accurate to the specific offeror.  b. Issue the signed letters to any offerors regarding missing proposal material or page limitation violations.
Proc Mbr Recorder	5.5.2.5	Will develop a final listing of offerors remaining (including any proposed subcontractors) for evaluation, to include detailed information such as company names, addresses, DUNS numbers, CAGE codes, and any official points of contact, along with their email address and phone number, if provided.

### 5.5.3 Assign Proposals for Evaluation

Actionee		Action
Recorder	5.5.3.1	a. Will, once all proposal volumes have been organized and all SEB participants have been cleared of any potential COIs against the source list, assign and distribute proposals (or specific portions thereof) to SEB Voting Members and respective Evaluators for their review/evaluation.  b. Will maintain records of the location of all proposals at all times.
SEB Voting Members SEB Evaluators SEB Committees Cost/Price Analyst	5.5.3.2	a. Will, upon receipt of proposals (or specific portions thereof), conduct a more detailed evaluation regarding proposal acceptability in accordance with NFS 1815.305-70, and document the review utilizing an approved procurement template.  b. Will, for all proposals determined to be acceptable, conduct a review/evaluation pursuant to the solicitation and the Source Evaluation Plan.  c. Will request focused proposal evaluation assistance from Center SMEs such as SBS, Industrial Labor Relations Specialist, Industrial Property Officer, SMA specialist, and Environmental specialist for applicable plans or approaches.  d. SEB Voting Members will read each proposal in its entirety.

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		e. SEB Evaluators, Committees, and Cost/Price Analysts will, at a minimum, read specific volumes/areas of each proposal commensurate with their area of evaluation.
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#### 5.5.4 Complete Offeror Clearances

Actionee		Action
Proc Mbr		<p>a. Shall review the <a href="#">Office of Federal Contract Compliance Programs (OFCCP) National Pre-Award Registry</a> and document that all offerors and any proposed subcontractors are listed to ensure all parties are certified as being fully compliant with Equal Employment Opportunity (EEO) statutes.</p> <p>b. Shall review and document that all offerors and any proposed subcontractors are <a href="#">Veterans' Employment and Training Service (VETS)</a> compliant in reporting annually on their affirmative action efforts in employing veterans.</p> <p>c. Shall review and document <a href="#">Federal Awardee Performance and Integrity Information System (FAPIIS)</a> information (in accordance with FAR 9.104-6) for all offerors and any proposed subcontractors to assist in a making an affirmative determination of responsibility.</p> <p>d. Shall review and document that all offerors are registered in the <a href="#">System for Award Management (SAM)</a> in accordance with FAR 4.1103 before awarding a contract or agreement.</p> <p><i>Note: The Proc Mbr should assess SAM compliance early in the acquisition process, but no later than establishment of the competitive range, to allow registration to be a topic of discussions. In the case of award without discussions, award will be made in accordance with FAR 4.1103.</i></p> <p>e. Shall additionally review SAM for all offerors and any proposed subcontractors to ensure all parties have no active exclusions listed (e.g., suspensions, debarments) that would affect eligibility for award.</p> <p>f. Shall, utilizing an approved procurement template, prepare a memorandum addressing the eligibility requirements of the offeror and any proposed subcontractors</p>

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		in relation to compliance with EEO, VETS, FAPIIS, and SAM.
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### 5.5.5 Conduct Mission Suitability Evaluation

Actionee		Action
SEB Voting Members  SEB Evaluators or SEB Committees  Center SMEs		<p>a. Shall, pursuant to the Source Evaluation Plan, individually develop a detailed list of strengths and weaknesses, without determining significance, for each proposal under each Mission Suitability subfactor in accordance with the definitions delineated in 5.5.10.</p> <p><i>Note: If Key Personnel are evaluated under any Mission Suitability subfactor, an additional rating of Adequate (A) may be utilized if it is determined the individual neither increases nor decreases the likelihood of successful contract performance in the capacity proposed.</i></p> <p>b. Will thoroughly document the basis for the initial Mission Suitability evaluation's findings sufficient to allow traceability of all findings to both the originator and origin of reference in the specific proposal, volume, page, and section (if applicable in each proposal).</p> <p>c. Will, for responses to solicitation requirements which will not have any appreciable impact, either positive or negative, on contract performance and therefore do not warrant a finding (e.g., strength), document the determination of adequacy (documented rationale is not considered necessary).</p>

### 5.5.6 Conduct Cost/Price Evaluation

Actionee		Action
Cost/Price Analyst	5.5.6.1	<p>Shall, in accordance with FAR Part 15, NFS Part 1815, and the Source Evaluation Plan:</p> <p>a. For fixed price acquisitions, complete a price evaluation comprising a comparison of the proposed prices.</p> <p><i>Note: A cost analysis to establish price reasonableness is generally not necessary for fixed price acquisitions as competition normally establishes price reasonableness. However, in accordance with FAR 15.404-1(d)(3), Proposal Analysis Techniques, cost realism analyses</i></p>



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		<p><i>may, in exceptional cases, also be used on fixed-price type contracts when new requirements may not be fully understood by competing offerors, there are quality concerns, or past experience indicates that offeror's proposed costs have resulted in quality or service shortfalls, with results of the analysis available for use in supporting performance risk assessments and responsibility determinations.</i></p> <p>b. For cost-reimbursement acquisitions:</p> <p>(1) Conduct a cost evaluation of the resources proposed (e.g., skill mix, hours, facilities, material costs) to assess the offeror's understanding of the requirements.</p> <p>(2) Conduct, as part of the cost evaluation, a cost analyses to assess the reasonableness and realism (or lack thereof) of the proposed costs, which results in the establishment of a Government probable cost position.</p> <p><i>Note: The Government probable cost position may be identical to the offeror's proposed cost.</i></p> <p>(3) Not make probable cost adjustments at levels lower than PWS/WBS levels at which cost proposals were required to be prepared.</p> <p>(4) Consider any adequately explained and justifiable efficiencies in proposals prior to making probable cost adjustments.</p> <p><i>Note: Coordination with SEB Members is generally recommended when performing this step (e.g., for aspects such as probable cost adjustments to the number of the offeror's Work Year Equivalent (WYE) employees or their respective hours).</i></p> <p>(5) Not make arbitrary probable cost adjustments to align proposals with the IGCE.</p> <p>(6) Consider identifying any other cost-related issues that do not rise to the level of a finding (e.g., discrepancies with audit findings, inflated cost for specific WBS areas, inconsistencies in the Cost Volume) and formulate a question in the event of discussions.</p>
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		(7) Will, based on input from the SEB, prepare a cost report describing the results of the analysis, to include explanation of any probable cost adjustments.
SEB Voting Members  SEB Evaluators or SEB Committees	5.5.6.2	Will, for cost-reimbursement acquisitions, review and furnish necessary adjustments for any refinement of the resources proposed (e.g., skill mix, hours, facilities, material costs) to the Cost/Price Analyst for use in developing a Government probable cost position for each proposal.

#### 5.5.7 Conduct Past Performance Evaluation

Actionee		Action
SEB Voting Members		<p>a. Shall individually document findings within the Past Performance factor and assess strengths, weaknesses, and adequacies using the process set forth in the Source Evaluation Plan.</p> <p><i>Note: A past performance reference contract may be determined Adequate when, for example, a referenced contract is determined to be relevant or highly relevant and with satisfactory performance history.</i></p> <p>b. Will survey past performance references provided by the offeror and any other references that the SEB considers pertinent to the acquisition in order to assist the SEB in establishing strengths and weaknesses in support of the eventual confidence level assessment of the offeror's past performance.</p> <p>c. Will review <a href="#">Contractor Performance Assessment Reporting System (CPARS)</a>, particularly when past performance questionnaires for reference contracts were not received by the SEB.</p> <p>d. Will, in coordination with SSO Advisor, Proc OC, Proc OM, and the Legal Representative, conduct communications in accordance with FAR 15.306(b)(1) with any offerors who have adverse past performance information to which the offeror has not had a prior opportunity to respond.</p>

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#### 5.5.8 Review All Findings

Actionee		Action
SEB Evaluators or SEB Committees  Center SMEs	5.5.8.1	<p>a. Will provide written findings to the SEB for consideration via a set of consolidated findings using the SSO electronic evaluation system, if available, or other electronic formats such as Excel or Word.</p> <p>b. May additionally provide an oral report (i.e., presentation) to the SEB summarizing the written findings.</p>
SEB Voting Members	5.5.8.2	Will review the findings of all Evaluators and any SEB Committees along with the individual findings of each SEB Voting Member.

#### 5.5.9 Develop Consensus Findings

Actionee		Action
SEB Voting Members		<p>a. Shall, pursuant to the Source Evaluation Plan, develop a consensus list of strengths and weaknesses for the first proposal evaluated under each of the Mission Suitability subfactors, as well as a consensus list of strengths and weaknesses under the Past Performance factor.</p> <p>b. Will, during consensus, ensure all findings carried forward are edited to be consistent in terms of formatting, sentence structure, grammar, tense, and proposal reference numbering nomenclature (e.g., “(Vol. I, Section 1.2, pp. 34-39, RFP Ref. Management Technical Approach-1(a))”) regardless of the original authorship of the finding.</p> <p>c. Should, after consensus findings have been reached for the initial proposal evaluated (ideally to include consensus evaluation of Cost/Price and Past Performance Volume findings), consider seeking the preliminary advice from the Proc OC, SSO Advisor, and Legal Representative regarding the adequacy of the initial findings prior to completing consensus findings for the remainder of proposal volumes.</p> <p>d. Will, after considering preliminary advice, complete consensus of initial findings for the remainder of all proposal volumes.</p>

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#### 5.5.10 Ranking of Findings followed by Determining Significant Strengths and Weaknesses

Actionee		Action
SEB Voting Members		<p>a. Shall determine by consensus for each of the Mission Suitability subfactors as well as the Past Performance factor, a ranked listing of all strengths and weaknesses in order of importance.</p> <p>b. Shall determine by consensus which of the strengths and weaknesses for both the Mission Suitability and Past Performance factors are considered significant as follows:</p> <p>(1) Strength is an aspect of the proposal that will have some positive impact on the successful performance of the contract.</p> <p>(2) Significant strength is some aspect of the proposal that greatly enhances the potential for successful contract performance.</p> <p>(3) Weakness means a flaw in the proposal that increases the risk of unsuccessful contract performance.</p> <p>(4) Significant weakness in the proposal is a flaw that appreciably increases the risk of unsuccessful contract performance.</p> <p>(5) Deficiency is a material failure of a proposal to meet a Government requirement or a combination of significant weaknesses in a proposal that increases the risk of unsuccessful contract performance to an unacceptable level.</p> <p>c. Will review the ranked summation of all significant strengths, strengths, significant weaknesses, weaknesses, and deficiencies assessed for each proposal to ensure they accurately reflect the findings of the SEB.</p>

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#### 5.5.11 Complete Initial Findings Review

Actionee		Action
SEB Voting Members	5.5.11.1	Will, prior to submitting the findings to advisors for initial findings review, at a minimum, ensure the findings satisfy quality aspects of the “Initial Findings Presentation Review” in accordance with Appendix F.3.1, with the exception of guidelines pertaining to chart formatting.
Recorder SEB Chair	5.5.11.2	Will, in accordance with 5.9.1, ensure the timelines are followed for initiating the findings review.
SEB Chair	5.5.11.3	<p>Shall, after SEB Voting Members have finalized all findings, conduct an initial findings IDR in accordance with 5.9.2, with the following noted exceptions:</p> <p>a. Location of IDR meeting can be in either the board's inner/assigned room or an external meeting room, with the meeting to be informal in nature regardless of location.</p> <p>b. Req Org, Chief Financial Officer (OCFO) (RS01) Representative (hereafter referred to as “CFO Representative”), Cost/Price Analyst, and supplemental advisors should not be invited unless requested by either the Proc OC, SSO Advisor, or Legal Representative.</p> <p><i>Note: There is no official document or formatting at this stage. This IDR (and subsequent DRB) at this step is intended as a preliminary review of initial findings by primarily the Office of Procurement and Legal Representative. SEB Members will arrange findings in a manner conducive to those advisors being able to conduct an electronic review of all findings/volume evaluations prior to adjectival rating and scoring of Mission Suitability subfactors and eventual incorporation of all findings/volume evaluations into the Initial Findings Presentation format.</i></p>
SEB Voting Members	5.5.11.4	<p>Will, prior to routing the findings for an initial findings DRB:</p> <p>a. Consider any comments/advice given during the IDR relative to the adequacy and consistency of the initial findings.</p> <p><i>Note: It is not unusual for the SEB to make adjustments to its consensus findings at this stage in the process, especially with regard to which strengths and/or</i></p>

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		<p><i>weaknesses are considered significant, or which strengths and/or weaknesses may be combined into a consolidated finding.</i></p> <p>b. If revisiting any findings results in a notable change, consult with the respective IDR advisors relative to the adequacy and consistency of the changes prior to proceeding with DRB.</p> <p>c. At a minimum, ensure the findings satisfy all aspects of the “Initial Findings Presentation Review” in accordance with Appendix F.3.2, with the exception of guidelines pertaining to scoring and final findings.</p>
SEB Chair	5.5.11.5	<p>Shall, after SEB Voting Members have all findings finalized, conduct an initial findings DRB in accordance with 5.9.3, with the following noted exceptions:</p> <p>a. Location of DRB meeting can be in either the board's inner/assigned room or an external meeting room, with the meeting to be informal in nature regardless of location.</p> <p>b. Req Org, Lead Cost/Price Analyst, and supplemental advisors should not be invited unless requested by either the Proc OM, SSO OM, or Legal Representative.</p> <p>c. Do not initiate plans for a CRT review at this stage.</p>
SEB Voting Members	5.5.11.6	<p>Will, prior to proceeding with assigning adjectival ratings and scores to Mission Suitability subfactors:</p> <p>a. Consider any comments/advice given during the DRB relative to the adequacy and consistency of the initial findings.</p> <p><i>Note: It is not unusual for the SEB to make additional refinements to its consensus findings at this stage.</i></p> <p>b. If revisiting any findings results in a notable change, consult with the respective DRB advisors relative to the adequacy and consistency of the changes.</p>

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#### 5.5.12 Assign Adjectival Ratings and Scores to Mission Suitability Subfactors

Actionee		Action
SEB Voting Members		<p>a. Shall determine the appropriate adjectival ratings by Mission Suitability subfactor, adhering to the process set forth in the Source Evaluation Plan and NFS 1815.305.</p> <p><i>Note: It is highly encouraged to have the Legal Representative and SSO Advisor present during this step to assist the adjectival ratings/scoring process.</i></p> <p>b. Shall determine the consensus whole-number percentile for each Mission Suitability subfactor that aligns with the adjectival rating assigned, followed by applying the percentile to the subfactor weight to determine the point score for each subfactor.</p> <p><i>Note: The summation of all numerical subfactor scores comprises the overall Mission Suitability score.</i></p> <p>c. Shall not establish an overall adjectival rating for the Mission Suitability factor in accordance with NFS 1815.370 (h)(2)(viii).</p>

#### 5.5.13 Assign Confidence Level to Past Performance Factor

Actionee		Action
SEB Members		Shall establish a Past Performance confidence level for each proposal using the confidence ratings in accordance with NFS 1815.305(a)(2)(A) and the Source Evaluation Plan.

#### 5.5.14 Develop Initial Findings Presentation

Actionee		Action
SEB Members		Shall develop the Initial Findings Presentation utilizing an approved procurement template.

#### 5.5.15 Complete Initial Findings Presentation Document Review

Actionee		Action
SEB Members	5.5.15.1	<p>a. Will ensure the Initial Findings Presentation fully captures all initial proposal evaluation findings.</p> <p>b. Will, prior to submitting the Initial Findings Presentation for document review procedures, at a minimum, ensure the</p>

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		presentation satisfies all aspects of “Initial Findings Presentation Review” in accordance with Appendix F.3.1.
Recorder SEB Chair	5.5.15.2	Will, in accordance with 5.9.1, ensure proper timelines are followed for initiating formal Initial Findings Presentation review procedures.  <i>Note: See Document Review Timelines for Initial Findings Presentation in accordance with Appendix E.1 and SEB Document Review Flow-Chart in accordance with Appendix E.3.</i>
SEB Chair	5.5.15.3	Shall, after SEB Members finalize the Initial Findings Presentation, conduct Initial Findings Presentation IDR in accordance with 5.9.2.
SEB Voting Members	5.5.15.4	Will, prior to routing the Initial Findings Presentation for the DRB:  a. Consider any comments/advice given during the IDR (e.g., adequacy and consistency of the initial findings, adjectival ratings and scoring of Mission Suitability subfactors, Past Performance confidence level assessments).  b. At a minimum, ensure the Initial Findings Presentation satisfies all aspects of “Initial Findings Presentation” in accordance with Appendix F.3.2.  c. Will, when considered appropriate, conduct a dry run of the briefing to facilitate a more effective CRT/SSA presentation.
SEB Chair	5.5.15.5	Shall conduct Initial Findings Presentation DRB in accordance with 5.9.3.
SEB Members	5.5.15.6	Will, prior to routing the Initial Findings Presentation and its applicable documents for the CRT:  a. Consider any comments/advice given during the DRB (e.g., adequacy and consistency of the initial findings, adjectival ratings and scoring of Mission Suitability subfactors, Past Performance confidence level assessments).  b. At a minimum, ensure the Initial Findings Presentation satisfies all “Initial Findings Presentation” in accordance with Appendix F.3.3.
SEB Chair	5.5.15.7	Shall conduct the CRT in accordance with 5.9.5.
SEB Members	5.5.15.8	Will ensure all CRT comments have been dispositioned and the Initial Findings Presentation finalized accordingly.



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SEB Chair	5.5.15.9	Shall obtain either the SSA's Source Selection Decision (SSD) or the Proc OM and SSA's competitive range determination based on the Initial Findings Presentation in accordance 5.9.6.
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## 5.6 Competitive Range, Discussions, and Final Proposal Evaluation

### 5.6.1 Document Competitive Range Determination

Actionee		Action
Proc OM	5.6.1.1	<p>a. Shall, with the concurrence of the SSA, establish the rationale for a competitive range determination.</p> <p>b. Will make it a working goal to include no more than three proposals in the competitive range in order to permit an efficient competition among the most highly rated proposals in accordance with NFS 1815.306(c)(2).</p>
Proc Mbr	5.6.1.2	<p>Shall, utilizing an approved procurement template, prepare a draft of the Memorandum for Record to document the competitive range determination.</p> <p><i>Note: Support in preparing the Memorandum for Record to document the competitive range determination is available through the Proc OC, SSO Advisor, and Legal Representative, as determined necessary by the Proc Mbr.</i></p>
Proc OM	5.6.1.3	<p>Shall, with the assistance of the Legal Representative and utilizing the draft memorandum prepared by Proc Mbr, finalize the Memorandum for Record documenting the competitive range determination.</p> <p><i>Note: While not required, support in finalizing the Memorandum for Record documenting the competitive range determination is additionally available through the SSO OM.</i></p>
Proc Mbr	5.6.1.4	Shall route the competitive range determination for concurrence through the SSA in accordance with PS-OWI-05.

### 5.6.2 Develop and Issue Letters to Offerors for Notification of Competitive Range

Actionee		Action
Proc Mbr	5.6.2.1	<p>a. Shall in accordance with FAR 15.503, utilizing an approved procurement template, prepare a letter for each offeror considered to be outside of the competitive range.</p> <p>b. Shall, at a minimum, for each offeror considered to be outside of the competitive range:</p>

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		<p>(1) Include in the letter a brief explanation of the reasons for exclusion from the competitive range.</p> <p>(2) Inform the offeror that a proposal revision will not be accepted or considered.</p> <p>(3) Notify the offeror that the Office of Procurement will provide a formal debriefing in accordance with FAR 15.505 or 15.506 (i.e., either a pre-award or post-award debriefing at the offeror's discretion) if the offeror requests one in writing within three days of notice of exclusion.</p> <p>c. Shall, utilizing an approved procurement template, prepare a letter for each offeror considered to be inside the competitive range, informing them of this determination and advising them a detailed letter initiating discussions will be forthcoming.</p> <p>d. Will route all competitive range letters for approval as a group, to be reviewed, at a minimum, by the Proc OC and Legal Representative prior to being tendered to the Proc OM for approval.</p>
Proc OM	5.6.2.2	<p>a. Will review letters to all offerors for notification of the competitive range determination.</p> <p>b. Should consider coordination with the Legal Representative if any changes are made prior to approving.</p>
Proc Mbr	5.6.2.3	<p>a. In coordination with the Recorder:</p> <p>(1) Will, prior to issuing any communications to an offeror (regardless of the method of delivery, be it email, direct mailing, or any other alternate means), ensure a peer is available (as a second set of eyes) to confirm information being sent is accurate to the specific offeror.</p> <p>(2) Shall issue the signed letters to all offerors for notification of the competitive range determination.</p> <p>b. Will, for any offeror excluded from the competitive range that requests (in writing) a pre-award debriefing, begin preparations in accordance with 5.8.</p> <p>c. Will, for any offeror excluded from the competitive range that requests (in writing) a post-award debriefing, notify the offeror that the Office of Procurement will provide a formal post-award debriefing following award.</p>

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### 5.6.3 Develop and Issue Discussions Letters for Offerors Remaining in Competitive Range

Actionee		Action
Proc Mbr	5.6.3.1	<p>a. Shall, utilizing an approved procurement template, prepare a detailed discussions letter for each offeror determined to be within the competitive range.</p> <p>b. Shall, at a minimum, have the detailed discussions letters include:</p> <p>(1) The tentative date for oral discussions, including whether oral discussions will occur in person (if so, add the tentative location in the letter) or be conducted by telephone (such as when questions or comments to all offerors are few, relatively simple, and straightforward).</p> <p>(2) A listing of all deficiencies, significant weaknesses, weaknesses, and questions relating to areas of the proposal requiring additional substantiation.</p> <p><i>Note: In accordance with FAR 15.306(d)(3), the discussions process, at a minimum, will indicate or discuss with each offeror deficiencies and significant weaknesses. Usually it is in the best interest of the Government to expand the scope of discussions to discuss other aspects (e.g., weaknesses and questions) of the offeror's proposal that could be altered or explained to materially enhance the proposal's potential for award. Furthermore, care should be taken to ensure that information provided directly to the Government by any proposed subcontractors (outside of information supplied by the offeror) remains protected from offerors during discussions, with any discussion of proprietary subcontractor information limited to discussions directly with the submitter of the information. It is recommended that the letter attachment describing each item to be discussed be used to maintain the iterative dialog of responses and final resolution of each, as the permanent electronic record of the discussions process. If this approach is utilized, portions of the instruction at 5.6.6 and 5.6.7 may be unnecessary, though electronic discussions must comply with the restrictions at 5.6.7.4..</i></p>

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		<p>(3) A listing of all innovations, approaches, advance agreements, and/or corporate investments that the Government wishes to incorporate into the model contract.</p> <p>(4) A listing of all proposed changes to the model contract resulting from FAR/NFS/MSFC updates and other regulatory changes that have occurred since release of the RFP.</p> <p>(5) Instructions regarding the offeror's submission of their written response to this letter, to include the time and place for its submission (normally within seven to ten calendar days) and any written response submission requirements (e.g., electronic submission to the Proc Mbr).</p> <p><i>Note: A shorter period of time may be appropriate for offerors to provide a written response if there is a limited number of items requiring correction or discussion; however, sufficient time should be afforded to accommodate the offeror with the most extensive required response. The amount of response time afforded will be identical across all offerors remaining in the competitive range, such that all remaining offerors have a uniform due date and time for providing their written response.</i></p> <p>(6) A forward-looking outline detailing the written/oral discussions and Final Proposal Revision (FPR) submittal process and schedule, to include a disclosure statement that all issues will not be considered fully resolved until responses are incorporated into the offeror's FPR.</p> <p>(7) Designation of a point of contact at the Center (usually the Proc Mbr).</p>
SEB Members	5.6.3.2	<p>Will review and edit the discussions letters to offerors.</p> <p><i>Note: The accuracy of the letters are crucial to ensuring success of the ensuing written/oral discussions.</i></p>
Proc Mbr	5.6.3.3	Will route all discussions letters for approval as a group, to be reviewed, at a minimum, by the Proc OC and Legal Representative prior to being tendered to the Proc OM for approval.
Proc OM	5.6.3.4	a. Will review discussions letters to all offerors remaining in the competitive range.

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		b. Should consider coordination with the Legal Representative if any changes are made prior to approving.
Proc Mbr	5.6.3.5	<p>With assistance from the Recorder:</p> <p>a. Will, prior to issuing any communications to an offeror (regardless of the method of delivery, be it email, direct mailing, or any other alternate means), ensure a peer is available (as a second set of eyes) to confirm information being sent is accurate to the specific offeror.</p> <p>b. Shall issue the signed discussions letters to all offerors in the competitive range.</p>

#### 5.6.4 Preliminary Arrangements for Oral Discussions

Actionee		Action
Proc Mbr	5.6.4.1	<p>In support of tentative logistical arrangements for oral discussions:</p> <p>a. Will, prior to issuing any communications to an offeror (regardless of the method of delivery, be it email, direct mailing, or any other alternate means), ensure a peer is available (as a second set of eyes) to confirm information being sent is accurate to the specific offeror.</p> <p>b. Will maintain contact with the offerors remaining in competitive range to arrange their tentative attendance at oral discussions (e.g., coordinating onsite access).</p>
Recorder	5.6.4.2	<p>Will, with the assistance of the Proc Mbr, make tentative arrangements for the oral discussions, including but not limited to:</p> <p>a. Reserving a suitable conference area outside of the secure SSO SEB areas, to include ensuring adequacy and arrangement of furniture and availability and functionality of required visual aid equipment in the conference area, or obtaining a teleconference number and passcode for use in conducting telephonic discussions.</p> <p>b. Reserving a suitable secondary caucus room to facilitate any breakout sessions.</p> <p>c. Coordinating scheduling of Government personnel necessary to support oral discussions (see 5.6.6.1).</p>

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		<p>d. Coordinating with MSFC Protective Services and Export Control Office (AS50) concerning registration and entry of offeror personnel.</p> <p>e. Coordinating the oral discussions meetings with other offices in the general area in order to minimize disruption to normal operations.</p> <p>f. Coordinating conference recording (audio or audio/visual) arrangements, to include ensuring that Center Operations Directorate civil service personnel operate the recording equipment, and that the respective Center Operations personnel satisfy COI disclosures in coordination with the Office of the General Counsel prior to participation.</p> <p><i>Note: It is recommended that discussions be recorded only in unusual circumstances. Rather, the SEB should maintain comprehensive notes of verbal discussions for use in establishing the final discussions record.</i></p> <p>g. Ensuring that unauthorized support contractors are not in the area during the meetings and do not gain access to SEB sensitive procurement information.</p>
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#### 5.6.5 Receive, Log, and Review of Offeror's Written Responses

Actionee		Action
SEB Members	5.6.5.1	Shall receive, log, and organize written responses in a manner consistent with receipt of proposals in accordance with 5.5.1.1, unless electronic transmission of responses to the Proc Mbr is utilized.
Recorder	5.6.5.2	<p>a. Will, once all written responses have been organized, distribute responses (or specific portions thereof) to SEB Voting Members and respective evaluators for their review/evaluation.</p> <p>b. Will maintain records of the location of all written responses at all times.</p>
SEB Voting Members SEB Evaluators SEB Committees Cost/Price Analyst	5.6.5.3	a. Will, upon receipt of written responses (or specific portions thereof), conduct a detailed evaluation of each response to determine if it resolves noted deficiencies, significant weaknesses, weaknesses, and questions specific to the offeror's original proposal submission.

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		<p>b. Should request focused evaluation assistance from Center SMEs in areas such as SBS, Industrial Labor Relations, Property, SMA, and Environmental.</p> <p><i>Note: These steps do not result in evaluators writing formal findings against any portion of an offeror's written response. SEB Voting Members will review the full written response for all offerors, while all other evaluators should focus on their specific areas of expertise to determine if each issue is fully resolved or if oral discussions will need to continue in any area.</i></p>
SEB Voting Members	5.6.5.4	<p>Will review the determinations of all respective evaluators and any SEB Committees along with the individual determinations of each SEB Voting Member to determine as a consensus whether or not each issue noted in an offeror's discussions letter is fully resolved or if either written or oral discussions will need to continue in any area.</p> <p><i>Note: Normally the SEB's review of written responses results in the closure of many areas of concern, allowing the SEB to become well prepared for oral discussions by focusing on any responses that are not sufficient to address remaining areas of concern. However, the offeror's response to any issues raised at any point during discussions may result in the evaluation team's identification of additional items that need to be addressed during oral discussions.</i></p>

#### 5.6.6 Develop and Issue Follow-Up Discussions Letters for Offerors Remaining in Competitive Range

Proc Mbr	5.6.6.1	<p>a. Shall, utilizing an approved procurement template, prepare a follow-up discussions letter for each offeror within the competitive range.</p> <p>b. Shall, at a minimum, have the follow-up discussions letters include:</p> <p>(1) The final date, time, and agenda for oral discussions (if necessary), including whether oral discussions will occur in person (if so, add the location in the letter, as well any requirements to enable onsite access) or be conducted by telephone (such as when questions or comments to all offerors are few, relatively simple, and straightforward), or if</p>
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		<p>remaining discussions will be conducted via additional written correspondence.</p> <p>(2) For oral discussions, any specifically desired offeror attendees (e.g., a cost analyst representative).</p> <p>(3) For in-person oral discussions, any limits on the number of attendees.</p> <p>(4) A statement that the discussions meeting will be recorded, if appropriate.</p> <p>(5) An updated listing of all deficiencies, significant weaknesses, weaknesses, and questions relating to areas of the proposal requiring additional substantiation that were not resolved via the previous written correspondence.</p> <p>(6) For continued written correspondence (if oral discussions are not yet chosen), instructions regarding the offeror's follow-up submission of their written response to this letter, to include the time and place for its submission and any written response submission requirements.</p> <p>c. Will route all follow-up discussions letters for approval as a group, to be reviewed, at a minimum, by the Proc OC and Legal Representative prior to being tendered to the Proc OM for approval.</p>
Proc OM	5.6.6.2	<p>a. Will review follow-up discussions letters for all offerors remaining in the competitive range.</p> <p>b. Should consider coordination with the Legal Representative if any changes are made prior to approving.</p>
Proc Mbr	5.6.6.3	<p>In coordination with the Recorder:</p> <p>a. Will, prior to issuing any follow-up communications to an offeror (regardless of the method of delivery, be it email, direct mailing, or any other alternate means), ensure a peer is available (as a second set of eyes) to confirm information being sent is accurate to the specific offeror.</p> <p>b. Shall simultaneously issue the signed follow-up discussions letters to all offerors remaining in the competitive range.</p>

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#### 5.6.7 Make Final Preparations and Conduct Oral Discussions

*Note: The Proc Mbr normally presides over oral discussions. In the event the Proc OM considers a more experienced procurement representative is necessary (based on the acquisition's complexity or limited oral discussions experience of the Proc Mbr), the Proc OM will name the Oral Discussions Presiding Official.*

Actionee		Action
Proc Mbr or Oral Discussions Presiding Official  SEB Chair	5.6.7.1	<p>a. Shall, in accordance with the approved procurement template, develop the oral discussions meeting agenda for each offeror.</p> <p>b. Will develop the list of Government personnel supporting oral discussions (over and above the SEB Members).</p> <p>c. Should consider, at a minimum, including the following Government personnel for oral discussions:</p> <p>(1) Proc OC.</p> <p>(2) Legal Representative.</p> <p><i>Note: It is highly encouraged to have the Legal Representative present during oral discussions.</i></p> <p>(3) Cost/Price Analysts.</p> <p>(4) SEB Evaluators (based on technical complexity of any remaining issues).</p> <p>(5) Supplemental advisors (based on need for SMEs of any remaining issues), to include but not limited to, the SSO Advisor and Proc OM.</p>
Recorder	5.6.7.2	Will, with the assistance of the Proc Mbr, finalize logistical arrangements for the oral discussions.
Proc Mbr or Oral Discussions Presiding Official	5.6.7.3	<p>Will convene the SEB oral discussions participants to conduct any necessary rehearsals and to ensure all Government participants:</p> <p>a. Have a uniform understanding of the areas of discussions that each person will cover, as well as the basic protocol that is expected of all Government personnel during oral discussions.</p>

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		<p>b. Understand that the scope and extent of discussions are a matter of the Proc Mbr's or Oral Discussions Presiding Official's judgment.</p> <p>c. Understand that the Proc Mbr or Oral Discussions Presiding Official is not required to discuss every area where an offeror's proposal could be improved.</p>
SEB Oral Discussions Participants	5.6.7.4	<p>a. Shall conduct oral discussions with all offerors remaining in the competitive range.</p> <p>b. Will not engage in conduct that:</p> <p>(1) Favors one offeror over another.</p> <p>(2) Reveals another offeror's technical solution or price.</p> <p><i>Note: This includes not revealing information provided directly to the Government by any proposed subcontractors (outside of information supplied by the offeror), such that proprietary subcontractor information remains protected from offerors during discussions, with any discussion of proprietary subcontractor information limited to discussions directly with the submitter of the information.</i></p> <p>(3) Reveals the names of individuals providing reference information about an offeror's past performance.</p> <p>(4) Knowingly furnishes information in violation of FAR 3.104.</p> <p><i>Note: The aforementioned are in accordance with FAR 15.306(e).</i></p>
Proc Mbr or Oral Discussions Presiding Official	5.6.7.5	<p>a. Will ensure adherence to rules for oral discussions for all Government participants.</p> <p>b. Will, in consensus with other Government participants in attendance as discussions progress, determine if continued oral discussions are necessary to ensure resolution of all deficiencies, significant weaknesses, weaknesses, and questions.</p> <p>c. Will be responsible for concluding oral discussions with all offerors remaining in the competitive range following a consensus determination that meaningful discussions have</p>

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		occurred with regard to any outstanding deficiencies, significant weaknesses, weaknesses, and questions.
Proc OM	5.6.7.6	<p>a. May, as a result of discussions, with the concurrence of the SSA, no longer consider an offeror originally in the competitive range to be among the most highly rated offerors and eliminate them from the competitive range (in accordance with FAR 15.306(d)).</p> <p>b. Will, for any offerors eliminated from the competitive range at this juncture, direct the Proc Mbr to initiate steps in accordance with 5.6.2 to develop and issue appropriate letters.</p>

#### 5.6.8 Develop and Issue Letter Closing Discussions and Requesting FPR

Actionee		Action
Proc Mbr	5.6.8.1	<p>a. Shall, utilizing an approved procurement template, prepare a letter closing discussions and requesting FPRs from each offeror remaining in the competitive range.</p> <p>b. Shall in accordance with FAR 15.307 and NFS 1815.307, at a minimum, have the closing discussions/FPR request letters include:</p> <p>(1) A common due date and time for submission (normally within five to seven calendar days), along with any specific response submission requirements.</p> <p><i>Note: Since discussions are staggered, the common due date and time should be sufficient for all offerors to provide adequate FPR responses.</i></p> <p>(2) Instruct offerors to incorporate all changes to their offers resulting from discussions, such that all issues will not be considered fully resolved unless their discussions responses are incorporated into the offeror's FPR, and to provide clear traceability from changes made between initial proposals to their FPR submission.</p> <p>(3) Require offerors to complete and execute the “model” contract (which has been uniquely prepared to accompany each offeror’s FPR request, to include any special provisions or performance capabilities the offeror proposed above those specified in the RFP that the Government desires to capture).</p>

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		<p>(4) Caution offerors against unsubstantiated changes to their proposals and instruct offerors to provide supporting rationale/documentation to substantiate any changes.</p> <p>(5) Establish a page limit for the FPRs to incorporate any additional pages necessary to reflect the offeror's resolution of any deficiencies, significant weaknesses, weaknesses, and questions.</p> <p><i>Note: It is recommended that the page limitation for all offerors be established based on the offeror submission requiring the most additional pages.</i></p> <p>(6) Advise offerors that the FPR is to be in writing (vs. oral) and that the Government intends to make award without obtaining further revisions, such that any new deficiencies, significant weaknesses, weaknesses, or questions discerned in the FPR submittal do not require the SEB to re-open discussions.</p> <p>(7) Advise offerors that proposal revisions received after the cutoff date will be considered a late proposal.</p> <p>(8) Encourage offerors to submit their most favorable and realistic cost/price proposal.</p> <p>c. Will route all closing discussions/FPR request letters for approval as a group, to be reviewed, at a minimum, by the Proc OC and Legal Representative prior to being tendered to the Proc OM for approval.</p>
Proc OM	5.6.8.2	<p>a. Will review closing discussions/FPR request letters for all offerors remaining in the competitive range.</p> <p>b. Should consider coordination with the Legal Representative if any changes are made prior to approving.</p>
Proc Mbr	5.6.8.3	<p>In coordination with the Recorder:</p> <p>a. Will, prior to issuing any communications to an offeror (regardless of the method of delivery, be it email, direct mailing, or any other alternate means), ensure a peer is available (as a second set of eyes) to confirm information being sent is accurate to the specific offeror.</p> <p>b. Shall simultaneously issue the signed letters to all offerors remaining in the competitive range to close discussions and request FPRs.</p>

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#### 5.6.9 Receive, Log, and Assign FPRs to Evaluators

Actionee		Action
SEB Members	5.6.9.1	<p>a. Shall receive, log, and organize FPRs in a manner consistent with receipt of proposals in accordance with 5.5.1.1.</p> <p>b. Will count FPR pages and conduct an overview of FPRs in a manner consistent with 5.5.2.1.</p>
Recorder	5.6.9.2	<p>a. Will, once all FPRs have been organized, distribute FPRs (or specific portions thereof) to SEB Voting Members and respective SEB Evaluators for their final review/evaluation.</p> <p>b. Will maintain records of the location of all FPRs at all times.</p>

#### 5.6.10 Conduct FPR Evaluation

Actionee		Action
SEB Voting Members  SEB Evaluators  SEB Committees  Cost/Price Analyst	5.6.10.1	<p>a. Will, upon receipt of FPRs (or specific portions thereof), individually conduct a final detailed evaluation of each FPR volume to determine:</p> <p>(1) If it resolves each deficiency, significant weakness, weakness, and question specific to the SEB's initial findings against the offeror's respective original proposal submission volume.</p> <p>(2) If any new findings are noted as a result of the FPR submission.</p> <p>b. May request focused evaluation assistance from Center SMEs in areas such as SBS, Industrial Labor Relations, Property, SMA, and Environmental.</p> <p>c. Will, utilizing the SEB's initial findings against each offeror's original proposal submission, individually write formal findings against each respective FPR Mission Suitability and Past Performance Volume, maintaining traceability between the initial findings and the final evaluation's findings, clearly identifying any changes.</p> <p><i>Note: This is generally accomplished using strikethrough font. In the event a new finding is generated during FPR evaluation, the finding will simply be annotated as a new finding.</i></p>

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Cost/Price Analyst	5.6.10.2	<p>a. Will, with support from SEB Voting Members, Evaluators, and Committees, review and evaluate the cost/price proposal data provided with the FPRs.</p> <p>b. Will, for cost-reimbursement acquisitions, with support from SEB Voting Members, Evaluators, and any SEB Committees, establish a probable cost position, clearly identifying any adjustments between the initial probable cost position and the FPR probable cost position.</p>
SEB Voting Members	5.6.10.3	<p>a. Will review the FPR findings of all respective Evaluators, any SEB Committees, and the individual FPR findings of each SEB Voting Member and determine by consensus each final FPR finding.</p> <p>b. Shall determine by consensus the significance of strengths and any remaining weaknesses, followed by ranking of FPR findings in a manner consistent with 5.5.10.</p>

#### 5.6.11 Complete Final Findings Review

Actionee		Action
SEB Voting Members		Shall conduct the final findings review in a manner consistent with 5.5.11, with the exception to utilize the Final Findings Presentation timeline for this SEB review in accordance with Appendix E.1.

#### 5.6.12 Assign FPR Adjectival Ratings and Scores to FPR Mission Suitability Subfactors

Actionee		Action
SEB Voting Members		Shall assign Mission Suitability subfactor adjectival ratings and score for the FPR in a manner consistent with 5.5.12.

#### 5.6.13 Assign FPR Confidence Level to Past Performance Factor

Actionee		Action
SEB Voting Members		Shall, if appropriate, assign level of confidence Past Performance ratings for the FPR in a manner consistent with 5.5.13.

#### 5.6.14 Develop Final Findings Presentation

Actionee		Action
SEB Members		a. Shall develop the Final Findings Presentation utilizing an approved procurement template.

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		<p><i>Note: The Final Findings Presentation charts primarily showcase changes made to the Initial Findings Presentation charts as a result of offeror's FPR submissions, to include removal of the majority of data from any offeror removed from competitive range.</i></p> <p>b. Will, when preparing the Final Findings Presentation, ensure that any initial findings deficiencies, significant weaknesses, and weaknesses resolved as result of FPRs are retained and shown as strikethrough text.</p> <p>c. Shall incorporate any new findings (ranked accordingly) among remaining FPR findings.</p> <p>d. Will ensure strikethrough changes are made to findings counts, adjectival ratings, scores, and any cost/price data to provide a logical audit trail.</p> <p>e. Will include supporting rationale for all changes made between the Initial Findings Presentation and the Final Findings Presentation.</p>
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#### 5.6.15 Complete Final Findings Presentation Document Review

Actionee		Action
SEB Members	5.6.15.1	<p>a. Will ensure the Final Findings Presentation fully captures all FPR evaluation findings and displays strikethrough mark-up highlighting any changes made since the Initial Findings Presentation.</p> <p>b. Will, prior to submitting the Final Findings Presentation for document review procedures, at a minimum, ensure the presentation satisfies all aspects of "Final Findings Presentation Review" in accordance with Appendix F.3.1.</p>
Recorder SEB Chair	5.6.15.2	<p>Will, in accordance with 5.9.1, ensure proper timelines are followed for initiating formal Final Findings Presentation review procedures.</p> <p><i>Note: See Document Review Timelines for Final Findings Presentation in accordance with Appendix E.1 and SEB Document Review Flow-Chart in accordance with Appendix E.3.</i></p>
SEB Chair	5.6.15.3	Shall, after SEB Members finalize the Final Findings Presentation, conduct the Final Findings Presentation IDR in accordance with 5.9.2.



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SEB Voting Members	5.6.15.4	Will, prior to routing the Final Findings Presentation for DRB:  a. Consider any comments/advice given during the IDR (e.g., adequacy and consistency of the final findings, adjectival ratings and scoring of FPR Mission Suitability subfactors, FPR Past Performance confidence level assessments).  b. At a minimum, ensure the Final Findings Presentation satisfies all aspects of “Final Findings Presentation Review” in accordance with Appendix F.3.2.
SEB Chair	5.6.15.5	Shall conduct Final Findings Presentation DRB in accordance with 5.9.3.
SEB Members	5.6.15.6	Will, prior to routing the Final Findings Presentation and its applicable documents for CRT:  a. Consider any comments/advice given during the DRB (e.g., adequacy and consistency of the final findings, adjectival ratings and scoring of FPR Mission Suitability subfactors, FPR Past Performance confidence level assessments).  b. At a minimum, ensure the Final Findings Presentation satisfies all “Final Findings Presentation” in accordance with Appendix F.3.3.
SEB Chair	5.6.15.7	Shall conduct the CRT in accordance with 5.9.5.
SEB Members	5.6.15.8	Will, prior to routing the Final Findings Presentation to obtain SSA approval, ensure all CRT comments have been reviewed and the Final Findings Presentation is finalized accordingly.
SEB Chair	5.6.15.9	Shall obtain SSA's SSD based on the Final Findings Presentation in accordance with 5.9.6.

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## 5.7 Source Selection, Notifications, and Award

### 5.7.1 SSA Provides SSD

Actionee		Action
SSA		<p>a. Will, in accordance with FAR 15.308 and NFS 1815.308, make an independent and deliberative SSD based on a comparative assessment of proposals against all source selection criteria in the solicitation.</p> <p><i>Note: While the SSA may use reports and analyses prepared by the SEB (e.g., the Initial or Final Findings Presentations), the SSD represents the SSA's independent judgment. The SSA has broad discretion in determining the manner and extent to which Mission Suitability, Cost/Price, and Past Performance evaluation results of the SEB are used, subject only to the tests of rationality and consistency with the evaluation criteria identified in the solicitation. The SSA makes the selection by identifying significant discriminators in each of the proposals resulting from the SEBs evaluation and explanation of the significance of those discriminators. It is the responsibility of the SSA to compare proposals using the findings made by the SEB. The numerical scoring presented to the SSA, which represents the SEB's relative ranking of proposals within the Mission Suitability factor, cannot be the sole basis for a selection decision. Instead, the selection is based upon a comparative assessment of the relative discriminators that includes a discussion of the benefits or risks/detriments associated with the discriminators of the selected offeror over all other offerors considering all evaluation factors.</i></p> <p>b. Will provide the attendees of the SSA Executive Session the rationale for the SSD to enable the selection decision's documentation in the Source Selection Statement (SSS).</p>

### 5.7.2 Develop SSS

Actionee		Action
Proc Mbr	5.7.2.1	Shall, utilizing an approved procurement template, prepare the body of the SSS explaining the procurement history of the acquisition, less the actual SSD and its supporting rationale.

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		<i>Note: Advance preparation of the background and evaluation portions of the SSS significantly reduces post-selection development time, enabling the Legal Representative to complete the SSS in a timely fashion when documenting the SSA's selection rationale. Initial questions when developing the SSS should be coordinated in advance of the SSA Executive Session with the Proc OC and SSO Advisor.</i>
Legal Representative	5.7.2.2	Shall add the SSA's SSD rationale to the body of the SSS in accordance with NFS 1815.308, the NASA Source Selection Guide, and NFS 1815.370(i).
Proc OM	5.7.2.3	Will review and refine the SSS.
Legal Representative		<i>Note: While not required, review and refinement support of the SSS is additionally available through the SSO OM.</i>

#### 5.7.3 Notify MSFC Public and Employee Communications Office and Develop Press Release

Actionee		Action
Proc Mbr	5.7.3.1	<p>a. Will notify the MSFC Public and Employee Communications Office (CS20) of the upcoming award selection.</p> <p>b. Shall, with the assistance of the MSFC Public and Employee Communications Office, prepare a draft Press Release for the pending award, which does not disclose the potential awardee or the actual anticipated value of the award.</p> <p>c. Will, if determined necessary by the MSFC Public and Employee Communications Office, with their assistance, prepare a Response to Questions (RTQ) document for the pending award.</p>
MSFC Public and Employee Communications Office	5.7.3.2	Will pre-coordinate the public announcement with the NASA HQ Office of Public Affairs relative to the upcoming award selection.

#### 5.7.4 Develop Administrator's Notification of Significant Contract Action (ANOSCA)

Actionee		Action
Proc Mbr		Shall, if the acquisition exceeds the dollar threshold specified at NFS 1805.303-71 and in accordance with NFS 1805.303-72(a)(2), prepare an ANOSCA for eventual submission to NASA HQ Office of Procurement.

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#### 5.7.5 Develop Award Notification Telephone Scripts and Letters to Offerors

Actionee		Action
Proc Mbr		<p>a. Shall, utilizing approved procurement or Agency templates, prepare award notification telephone scripts and accompanying letters to provide notification to unsuccessful offerors of the selection decision.</p> <p>b. Shall, utilizing approved procurement or Agency templates, prepare an award notification telephone script and an accompanying letter to provide notification to the successful offeror of the selection decision.</p> <p>c. Shall, at a minimum, include in all letters to all offerors:</p> <p>(1) A summary of the selection rationale.</p> <p>(2) Notification that, if requested, the SEB will provide a formal debriefing at the earliest opportunity.</p> <p>d. Shall include in the letter to the successful offeror an invitation to attend a post-award conference/contract initiation meeting, with details of the post-award conference to be forthcoming in future correspondence.</p> <p>e. Will route all award notification telephone scripts and offeror letters for approval as a group through, at a minimum, the Proc OC and Legal Representative prior to being tendered to the Proc OM for approval.</p> <p><i>Note: Notification of award letters will not contain the approved SSS at this time, but should include a placeholder for eventual incorporation prior to the Proc OM's approval of these letters.</i></p>

#### 5.7.6 Route SSS, ANOSCA, and Press Release for Approval through MSFC

Actionee		Action
Proc Mbr		<p>a. Will include the applicable ANOSCA and draft Press Release with the SSS for routing approvals.</p> <p><i>Note: The ANOSCA routes to the Proc Officer, followed by the Proc Officer notifying the Center Director or Deputy Center Director of the impending award utilizing an approved procurement template. The ANOSCA itself does not route through the Office of the Director (DA01).</i></p>

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		<p><i>The draft Press Release routes through the Legal Representative and should stop in the Office of Procurement no higher than the Proc OM level. All three documents, as applicable to the award, should simultaneously start their routing together as a package for a consistent review.</i></p> <p>b. Shall route the SSS for SSA approval through MSFC in accordance with PS-OWI-05.</p>
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#### 5.7.7 Notify NASA HQ and Obtain Authority To Proceed (ATP)

Actionee		Action
Proc Mbr	5.7.7.1	Shall, upon SSA approval of the SSS and Proc Officer notification that either the Center Director or Deputy Center Director has been notified of the ANOSCA, provide both the ANOSCA and Press Release to NASA HQ Office of Procurement via NASA's current encryption software in accordance with NFS 1805.303-72.
SEB Members	5.7.7.2	<p>Will take no further action until NASA HQ clears the ANOSCA through NASA HQ Legislative Affairs and provides authority for release of the selection information (in accordance with NFS 1805.303-71 and 1805.303-72).</p> <p><i>Note: The NASA HQ Office of Legislative Affairs will coordinate the date of public announcement of the award with the NASA HQ Office of Public Affairs. The NASA HQ Office of Public Affairs then coordinates announcement with the MSFC Public and Employee Communications Office. Upon approval for public announcement of the award, the NASA HQ Office of Legislative Affairs will communicate with the NASA HQ Office of Procurement, with the NASA HQ Office of Procurement in turn informing the Proc Mbr of the timing for notifying offerors of the award announcement. While the ANOSCA is submitted at least three business days prior to issuance of the pre-award notification letters at FAR 15.503(a)(2) for both full and open and small business set-asides acquisitions, the notification letters are provided separately for small-business set-asides. The pre-award notification letter provides information regarding the five-day size protest window. Upon closure of the five-day size protest window and concurrent with the release of the public announcement, the post-award notification letters are</i></p>

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		<i>released which provide information regarding requests for post-award debriefings. It is recommended that all post-award notification letters which provide information related to debriefing requests be released, if feasible, on a Monday or Tuesday in order to require debriefing requests within the same week.</i>
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#### 5.7.8 Notify MSFC Public and Employee Communications Office of Award

Actionee		Action
Proc Mbr		<p>a. Shall, following NASA HQ Office of Procurement's approval to make award notification, provide to the MSFC Public and Employee Communications Office the approved draft Press Release with the following information added:</p> <p>(1) The name and address of successful offeror.</p> <p>(2) The maximum potential amount for the entire contract period of performance, excluding any individual CLIN values or identification of any aspect of fee proposed.</p> <p>b. Will confirm with the MSFC Public and Employee Communications Office the date and time for public release of the award information, to ensure all communication channels are open between the MSFC Public and Employee Communications Office and NASA HQ Office of Public Affairs, and to ensure the public release of award information does not precede MSFC Office of Procurement's telephone notifications.</p>

#### 5.7.9 Notify Offerors and Award Contract

Actionee		Action
Proc Mbr	5.7.9.1	<p>a. Shall route the contract for execution in accordance with PS-OWI-05.</p> <p><i>Note: The award date on the contract will align with NASA HQ Office of Procurement's established date for notifying offerors and publicizing the award announcement.</i></p> <p>b. Will provide advance coordination with all offerors remaining in the competitive range to establish a date and approximate timeframe for them to receive a phone call notifying them of the selection decision.</p>

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Proc OM	5.7.9.2	Will utilize the approved telephone scripts to notify the successful and unsuccessful offerors of the source selection announcement.
Proc Mbr	5.7.9.3	Will finalize the award notification letters to all offerors upon completion of telephone notifications, ensuring a copy of the SSS is attached to each letter, and tender to the Proc OM for final approval.
Proc OM	5.7.9.4	<p>a. Will review award notification letters to all offerors after completion of telephone notifications.</p> <p>b. Should consider coordination with the Legal Representative if any changes are made prior to approving.</p>
Proc Mbr	5.7.9.5	<p>a. Will, prior to issuing any communications to any offeror throughout 5.7.9.5 (regardless of the method of delivery, be it email, direct mailing, or any other alternate means), ensure a peer is available (as a second set of eyes) to confirm information being provided is accurate to the specific offeror.</p> <p>b. Shall transmit the award notification letters to all offerors remaining in the competitive range.</p> <p>c. Shall, for the successful offeror, coordinate and transmit the executed contract.</p> <p>d. Will, for any local offeror electing to take hand-receipt of the original award notification letter or if the successful offeror for the executed contract, with the assistance of the Recorder, prepare a hand receipt to be signed by the offeror's representative to capture the date and time of retrieval of the respective documents.</p> <p><i>Note: Following the award notification of offerors remaining in the competitive range, the NASA HQ Office of Legislative Affairs will notify the respective members of Congress and subsequently Public Affairs (HQ or MSFC in accordance with NASA HQ's decision) issues the formal press release.</i></p>

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## 5.8 Debriefings and Conclusion of SEB Activities

### 5.8.1 Arrange for Debriefings of Offerors

*Note: The Proc Mbr normally presides over debriefings of offerors. In the event the Proc OM considers a more experienced procurement representative is necessary (based on the acquisition's complexity or limited debriefing experience of the Proc Mbr), the Proc OM will name the Debriefing Official. Debriefings will utilize an approved procurement template for either pre-award or post-award debriefs. While written debriefings (i.e., no iterative verbal dialog) are unusual, the templates may be modified to eliminate references to the iterative dialog normally associated with oral debriefings. Oral debriefings utilizing the approved scripts are recommended.*

Actionee		Action
Proc Mbr or Debriefing Official  SEB Chair	5.8.1.1	<p>a. Shall, for oral debriefings, regardless if in-person or via telephone, develop the list of Government personnel to support the oral debriefings (over and above the SEB Members).</p> <p>b. Should consider, at a minimum, including the following Government personnel for oral debriefings:</p> <p>(1) Proc OC.</p> <p>(2) Legal Representative.</p> <p><i>Note: It is highly encouraged to have the Legal Representative present during debriefings.</i></p> <p>(3) Cost/Price Analysts.</p> <p>(4) SEB Evaluators (based on technical complexity of findings that contributed to either the proposal being removed from the competitive range or contributed to the proposal not being selected for award).</p> <p>(5) Supplemental advisors (based on need for SME assistance with findings that contributed to either the proposal being removed from the competitive range or contributed to the proposal not being selected for award), to include but not limited to, the Proc OM and SSO Advisor.</p>
Proc Mbr	5.8.1.2	<p>In support of logistical arrangements for debriefings:</p> <p>a. Will, prior to issuing any communications to an offeror (regardless of the method of delivery, be it email, direct mailing, or any other alternate means), ensure a peer is</p>



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		<p>available (as a second set of eyes) to confirm information being sent is accurate to the specific offeror.</p> <p>b. Will maintain contact with offerors requesting a debriefing to arrange any logistics should the debriefing be conducted orally (whether in-person or via telephone) instead of in writing.</p> <p><i>Note: Generally, using an approved template, a follow-up email will provide specific logistics for the debriefing along with a request for relevant questions to be submitted in advance in order to facilitate a more comprehensive response to each.</i></p>
Recorder	5.8.1.3	<p>Will, if the debriefing is to be conducted in-person, with the assistance of the Proc Mbr, make arrangements for the debriefing, including but not limited to:</p> <p>a. Coordinating onsite access for offeror attendees.</p> <p>b. Reserving a suitable conference area outside of the secure SSO SEB areas, to include ensuring adequacy and arrangement of furniture.</p> <p>c. Coordinating scheduling of Government personnel necessary to support debriefings (see 5.8.1.1).</p> <p>d. Coordinating the debriefings meetings with other offices in the general area in order to minimize disruption to normal operations.</p>
Proc Mbr	5.8.1.4	<p>a. Shall, for pre-award debriefings, utilizing approved procurement templates, and in accordance with FAR 15.505 and NFS 1815.505, NASA Procurement Debriefing Guide, prepare debriefing letters or email correspondence and debriefing scripts (the latter of which develop the oral debriefings meeting agenda).</p> <p>b. Shall, at a minimum, have pre-award debriefing letters, email correspondence, or applicable debriefing scripts include:</p> <p>(1) If the debriefing is to be conducted orally: the date, time, and agenda for the debriefing, including whether the debriefing will occur in person (if so, add the location in the letter and any limits on the number of attendees, as well any requirements to enable onsite access) or be conducted by telephone, and a statement that it is MSFC's policy that</p>

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		<p>debriefings will be not be recorded by the Government nor recorded by the offeror.</p> <p>(2) A summary of the rationale for eliminating the offeror's proposal from the competition.</p> <p>(3) All of the proposal's significant strengths, strengths, significant weaknesses, weaknesses, and deficiencies.</p> <p>(4) The proposal's adjectival ratings for each Mission Suitability subfactor.</p> <p>(5) The proposal's overall Mission Suitability point score (see “c” below to ensure Mission Suitability subfactor scores are not released).</p> <p>(6) The debriefed offeror’s Past Performance level of confidence rating.</p> <p>(7) A summary of the debriefed offeror’s performance that resulted in the assigned Past Performance rating.</p> <p>(8) For cost-reimbursement acquisitions, significant probable cost adjustments made to the proposal (explain reasons for adjustments and quantify each relative to the proposed cost).</p> <p>c. Shall ensure that pre-award debriefing letters and applicable pre-award debriefing scripts do not include:</p> <p>(1) The number of offerors.</p> <p>(2) The identity of other offerors.</p> <p>(3) The content of other offeror's proposals.</p> <p>(4) The evaluation of other offerors.</p> <p>(5) Point scores for the debriefed offeror's proposal at the Mission Suitability subfactor level.</p> <p>(6) Any of the information prohibited in FAR 15.506(e) for post-award debriefings (also as noted below).</p> <p>d. Shall, for post-award debriefings, utilizing approved procurement templates, and in accordance with FAR 15.506 and NFS 1815.506, NASA Procurement Debriefing Guide, prepare debriefing letters or email correspondence and</p>
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		<p>debriefing scripts (the latter of which develop the oral debriefings meeting agenda).</p> <p>e. Shall, at a minimum, have post-award debriefing letters, email correspondence, or post-award debriefing scripts include:</p> <p>(1) If the debriefing is to be conducted orally: the date, time, and agenda for the debriefing, including whether the debriefing will occur in person (if so, add the location in the letter and any limits on the number of attendees, as well any requirements to enable onsite access) or be conducted by telephone, and a statement that it is MSFC's policy that debriefings will be not be recorded by the Government nor recorded by the offeror.</p> <p>(2) A copy of the SSS detailing the rationale for award if not previously provided.</p> <p>(3) For offerors excluded from the competitive range that requested a post-award debriefing in lieu of a pre-award debriefing, it is recommended a summary of the rationale for eliminating of the offeror's proposal from the competition be included.</p> <p>(4) Number of offerors.</p> <p>(5) Identity of offerors.</p> <p>(6) Identity of offerors in the competitive range.</p> <p>(7) All of the proposal's significant strengths, strengths, significant weaknesses, weaknesses, and deficiencies.</p> <p>(8) The proposal's adjectival ratings for each Mission Suitability subfactor.</p> <p>(9) The proposal's overall Mission Suitability point score (ensure Mission Suitability subfactor scores are not released in alignment with “c” above for pre-award debriefings).</p> <p>(10) The debriefed offeror’s Past Performance level of confidence rating.</p>
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		<p>(11) A summary of the debriefed offeror's performance that resulted in the assigned Past Performance rating.</p> <p>(12) The overall evaluated cost or price of the successful offeror and the debriefed offeror.</p> <p>(13) For cost-reimbursement acquisitions, any significant probable cost adjustments made to the FPR (explain reasons for adjustments and quantify each relative to the FPR cost) as any probable cost comparison between the awardee and the debriefed offeror.</p> <p>(14) Summary of the impact of discussions and proposal revisions on the original evaluation findings for the proposal, so that the offeror can gauge the success of its efforts regarding any discussions that were held and its FPR submitted.</p> <p>f. Shall ensure that post-award debriefing letters or applicable post-award debriefing scripts do not include:</p> <p>(1) Point-by-point comparisons of the debriefed offeror's proposal with those of other offerors.</p> <p>(2) Point scores for the debriefed offeror's proposal at the Mission Suitability subfactor level.</p> <p>(3) Any information prohibited from disclosure by FAR 24.202 or exempt from release under the Freedom of Information Act (5 U.S.C. 552) including trade secrets; privileged or confidential manufacturing processes and techniques; commercial and financial information that is privileged or confidential, including cost breakdowns, profit, indirect cost rates, and similar information; and the names of individuals providing reference information about an offeror's past performance.</p>
SEB Members	5.8.1.5	Will review and edit the debriefing letters and debriefing scripts prepared by the Proc Mbr. The accuracy of the letters and debriefing scripts is crucial to ensuring success of the ensuing debriefings.
Proc Mbr	5.8.1.6	Will route all debriefing letters and debriefing scripts for approval as a group, to be reviewed at a minimum, by the Proc OC and Legal Representative prior to being tendered to the Proc OM for approval.

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Proc OM	5.8.1.7	<p>a. Will review debriefing letters and debriefing scripts for all offerors requesting a debriefing.</p> <p>b. Should consider coordination with the Legal Representative if any changes are made prior to approving.</p>
Proc Mbr	5.8.1.8	<p>With assistance from the Recorder:</p> <p>a. Will, prior to issuing any communications to an offeror (regardless of the method of delivery, be it email, direct mailing, or any other alternate means), ensure a peer is available (as a second set of eyes) to confirm information being sent is accurate to the specific offeror.</p> <p>b. Shall issue the signed debriefing letters to all offerors being debriefed.</p>

## 5.8.2 Make Final Preparations and Conduct Oral Debriefings of Offerors

*Note: This process is for any Offeror that does not choose a written debriefing.*

Actionee		Action
Proc Mbr or Debriefing Official	5.8.2.1	<p>Will convene the SEB debriefings participants to conduct any necessary rehearsals and to ensure that all Government participants in the oral debriefings:</p> <p>a. Have a uniform understanding of individual responsibilities and the basic protocol expected during the debriefings.</p> <p>b. Are sufficiently prepared to answer questions specific to their areas of expertise.</p> <p><i>Note: Faulty memory or misstatements by SEB debriefing participants are detrimental to a successful debriefing. Participants are allowed to bring any necessary notes or other documents specific to the offeror being debriefed, provided the notes or documentation do not contain information pertaining to any other offeror's proposal.</i></p> <p>c. Understand that SEB debriefing participants are not allowed to bring the following materials into the debriefing room:</p> <p>(1) Proposals of other offerors.</p>

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		<p>(2) Evaluation notes or reports of other offeror's proposals.</p> <p>d. Understand that argumentative or defensive conduct is forbidden and that Government personnel present information in a positive manner (e.g., convey significant weaknesses, weaknesses, or deficiencies as areas of an offeror's proposal that could be improved when proposing against future acquisitions).</p> <p>e. Understand that while the scope and extent of oral debriefings are a matter of the Proc Mbr or Debriefing Official's judgment, they will provide the offeror being debriefed reasonable responses to relevant questions about whether source selection procedures contained in the solicitation, applicable regulations, and other applicable authorities were followed, as well as provide:</p> <p>(1) Open, appropriate, and meaningful information exchanges in order to reduce misunderstandings and protests.</p> <p>(2) A clear understanding of the Government's evaluation process and the basis for either the selection decision or the offeror's proposal being excluded from the competitive range.</p> <p>(3) An opportunity to demonstrate that the Government followed the rules, complied with the solicitation, and conducted the acquisition in an objective and fair manner.</p> <p>(4) An opportunity to positively affect the quality of offeror's future proposals by providing meaningful feedback for improvement in future acquisitions.</p> <p>(5) An opportunity to obtain feedback from the debriefed offerors regarding their views of the acquisition process for the procurement.</p>
SEB Debriefing Participants	5.8.2.2	<p>a. Shall conduct oral debriefings.</p> <p>b. Will be prepared to answer questions relating to the evaluation of the proposal.</p> <p>c. Will adhere to the Proc Mbr or Debriefing Official's leadership to avoid improper disclosure of information during debriefings.</p>

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		<p>d. Will, in addition to not discussing content excluded from debriefing letters and debriefing scripts (in accordance with 5.8.1.3, FAR 15.505 and 15.506, and NFS 1815.506, NASA Procurement Debriefing Guide) not engage in conduct that:</p> <p>(1) Answers hypothetical questions from offerors.</p> <p>(2) Improperly discloses competitor information (e.g., revealing another offeror's technical solution).</p> <p>(3) Knowingly furnishes information in violation of FAR 3.104.</p>
Proc Mbr or Debriefing Official	5.8.2.3	Will maintain order of oral debriefings and ensure adherence to the agenda and overall debriefing script.
Proc Mbr Recorder	5.8.2.4	<p>a. Shall prepare a summary memorandum of the debriefing for the SEB file following the debriefing.</p> <p>b. The memorandum shall, at a minimum, list all participants and any questions/responses that were discussed.</p> <p><i>Note: Remainder 5.8 work instructions follow post-award debriefings; after conducting pre-award debriefings, work instructions resume under 5.6.3.</i></p>

### 5.8.3 Issue Synopsis of Contract Award on GPE

Actionee		Action
Proc Mbr		<p>In support of synopsisizing the contract award on the GPE:</p> <p>a. Will, prior to posting any information on the GPE, ensure a peer with commensurate experience in this step is available (as a second set of eyes) to confirm information being uploaded is accurate.</p> <p>b. Shall, in the event no protest is received, eleven days after the final debriefing, utilizing data in the approved press release, post on the GPE a notice of contract award synopsis in accordance FAR 5.207 and the SSS in accordance with NFS 1815.308(3).</p>

### 5.8.4 Conduct SEB Out Brief

Actionee		Action
SEB Chair		Will inform SEB participants that information learned while serving on the SEB, to include any part of the proposal evaluation process or its results, is procurement sensitive and

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		will not be discussed or disclosed outside of the SEB, even after the Office of Procurement awards the contract and the SEB concludes debriefings.
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#### 5.8.5 Disposition SEB Documentation and Conclude SEB Activities

Actionee		Action
Recorder Proc Mbr	5.8.5.1	Will, in coordination with the SEB Chair and other SEB participants, apprise the Proc OC and Proc OM of the date when the acquisition-specific records will be ready for final transfer.
SEB Members	5.8.5.2	Will not begin dispositioning records until the protest period has expired.
Proc OM	5.8.5.3	Will notify the SEB Chair, Proc Mbr, and Recorder that they may begin dispositioning of records following conclusion of the protest period.  <i>Note: This generally occurs on the eleventh day following the debriefing of offerors where a protest against the award was not received.</i>
SEB Members	5.8.5.4	a. Will clean up and dispose of any remaining material before returning to regular assignments, to include proper disposition of any remaining draft documentation.  b. Disposition of excess SEB documentation shall be in accordance with Appendix D.  c. Will assist the Proc Mbr in transferring all acquisition-specific records to the Proc OC.  d. Will provide the Legal Representative a copy of all attendance lists for key RDT and SEB meetings and events.
Proc OC	5.8.5.5	Will take receipt of all acquisition-specific records from the SEB.
SEB Members	5.8.5.6	a. Will complete any housekeeping efforts necessary to leave the appropriate SSO-dedicated areas clean and organized to prepare the facilities for follow-on use by the next source selection effort.  b. Will conclude SEB activities.
OCIO Representative	5.8.5.7	Will remove all SEB-generated information retained on any local computers in the acquisition-specific dedicated SEB areas.



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## 5.9 Document Review Procedures

### 5.9.1 Establish Timelines

Actionee		Action
RDT Lead or SEB Chair	5.9.1.1	<p>a. Will, for Center-level acquisitions, utilize the “Document Review Timeline” noted in accordance with Appendix E.1 in concert with the acquisition's primary schedule.</p> <p>b. Will, for Agency-level acquisitions, consult with the Proc OM and SSO OM to determine review procedures and timelines for all documents requiring HQ review/approval.</p> <p>c. Will coordinate with the Proc OC and SSO Advisor when requesting minor deviations from the Appendix E.1 document review timelines.</p> <p>d. Will coordinate with the Proc OM and SSO OM when requesting a significant deviation from any of the standard document review timelines. Request will include providing supporting rationale in writing to Proc OM and SSO OM.</p> <p><i>Note: This step includes the potential to shorten document review timelines, such as combining document review processes when the standard review process may not be necessary (e.g., if no significant changes were made to an RFP following release of the DRFP, it could be feasible to conduct a joint IDR/DRB document review process to shorten the overall document review timeline).</i></p> <p>e. Will, as requested by IDR/DRB reviewers, add up to three days beyond the normal IDR or DRB review timeframe to accommodate potential consolidation of comments by IDR/DRB reviewers.</p>
Proc OM SSO OM	5.9.1.2	Will confer on requests to significantly deviate from the standard document review timelines and apprise MSFC senior management accordingly relative to any impacts to their applicable document reviews.
Proc OC Proc OM SSO	5.9.1.3	Will assist the RDT or SEB in maintaining scheduled document reviews to preserve the RDT or SEB's acquisition schedule.

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## 5.9.2 Conduct IDR

Actionee		Action
RDT Lead or SEB Chair	5.9.2.1	Will, with the assistance of the Proc Spec or Recorder, confirm that all IDR participants (detailed in Section 5.9.2.2 below) have been cleared by the Office of the General Counsel of any known or potential COIs.
Proc Spec or Recorder	5.9.2.2	<p>a. Will coordinate schedules of IDR Members and arrange the time and location of formal IDR meeting.</p> <p>b. Shall ensure the scheduled IDR can be attended by required core IDR members at the time of scheduling.</p> <p>c. Will, for the PSM Briefing Charts, in accordance with SSO procedures and Appendix E.1, provide a meeting notification and electronic distribution of applicable documents for review/comment to the following IDR Members:</p> <p>(1) Proc OC (or designee).</p> <p><i>Note: Core member; chairs the IDR meeting.</i></p> <p>(2) RDT Members.</p> <p><i>Note: Quorum constitutes core with RDT Lead and Proc Spec being mandatory core members; document review comments are not anticipated from RDT Members; RDT Lead is primary meeting presenter; Proc Spec is supplemental meeting presenter.</i></p> <p>(3) SSO Advisor (or SSO OM as designee).</p> <p><i>Note: Core member.</i></p> <p>(4) Legal Representative.</p> <p><i>Note: Core member.</i></p> <p>(5) Office of Procurement, Policy and Review Office Member (hereafter referred to as "Policy Representative").</p> <p>(6) Req Org Representative.</p> <p>(7) CFO Representative.</p>

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		<p>(8) OCIO Representative.</p> <p>(9) Supplemental advisors germane to the acquisition (e.g., SBS, SMA, Industrial Labor Relations, Property, et al.).</p> <p><i>Note: Supplemental advisors should be invited based on the content of the acquisition subject to their expert review; the RDT commonly has involvement with these advisors prior to this document review meeting.</i></p> <p>d. Will, for the DRFP and RFP, in accordance with SSO procedures and Appendix E.1, provide a meeting notification and electronic distribution of applicable documents for review/comment to the following IDR Members:</p> <p>(1) Proc OC (or designee).</p> <p><i>Note: Core member; chairs the IDR meeting.</i></p> <p>(2) RDT Members/SEB Members.</p> <p><i>Note: Quorum constitutes core with RDT Lead/SEB Chair and Proc Spec/Proc Mbr being mandatory core members; document review comments are not anticipated from RDT Members/SEB Members; RDT Lead/SEB Chair is primary meeting presenter; Proc Spec/Proc Mbr is supplemental meeting presenter.</i></p> <p>(3) SSO Advisor (or SSO OM as designee).</p> <p><i>Note: Core member.</i></p> <p>(4) Legal Representative.</p> <p><i>Note: Core member.</i></p> <p>(5) Policy Representative.</p> <p>(6) Req Org Representative.</p> <p>(7) CFO Representative.</p> <p>(8) OCIO Representative.</p> <p>(9) Cost/Price Analyst.</p>
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		<p>(10) Supplemental advisors germane to the acquisition (e.g., SMA, Industrial Relations, Property, Transportation, et al.).</p> <p><i>Note: Supplemental advisors should be invited based on the content of the acquisition subject to their expert review; the RDT/SEB commonly has involvement with these advisors prior to this document review meeting. Transportation/AS42 should participate in the review when GSA Vehicles, use of MSFC's fuel station, or shipment of materials requiring export control apply.</i></p> <p>e. Will, for the Initial Findings Presentation and Final Findings Presentation, in accordance with SSO procedures and Appendix E.1, provide a meeting notification and electronic distribution of applicable documents for review/comment to the following IDR Members:</p> <p>(1) Proc OC (or designee).</p> <p><i>Note: Core member; chairs the IDR meeting.</i></p> <p>(2) SEB Members.</p> <p><i>Note: Quorum constitutes core with SEB Chair and Proc Mbr being mandatory core members; document review comments are not anticipated from SEB Members; SEB Chair is primary meeting presenter; Proc Mbr is supplemental meeting presenter.</i></p> <p>(3) SSO Advisor (or SSO OM as designee).</p> <p><i>Note: Core member.</i></p> <p>(4) Legal Representative.</p> <p><i>Note: Core member.</i></p> <p>(5) Req Org Representative.</p> <p>(6) CFO Representative.</p> <p>(7) OCIO Representative.</p> <p>(8) Cost/Price Analyst.</p>
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		<p>(9) Supplemental advisors germane to the acquisition (e.g., SBS, SMA, Industrial Relations, Property, et al.).</p> <p><i>Note: Supplemental advisors should be invited based on the content of the acquisition subject to their expert review; the SEB commonly has involvement with these advisors prior to this document review meeting.</i></p>
IDR Members	5.9.2.3	<p>a. Will conduct IDR documents review and provide electronic comments in accordance with Appendix E.1 timeline.</p> <p><i>Note: Comments provided should be succinct but sufficiently detailed to be actionable by RDT Members/SEB Members (e.g., where applicable, include recommended to include from/to language).</i></p> <p>b. Will, for PSM Briefing Charts, at a minimum, evaluate all documents in accordance with Appendix F.1.1.</p> <p>c. Will, for DRFP and RFP, at a minimum, evaluate all applicable documents in accordance with Appendix F.2.1.</p> <p>d. Will, for Initial Findings Presentation and Final Findings Presentation, at a minimum, evaluate all documents in accordance with Appendix F.3.1.</p>
RDT Members or SEB Members	5.9.2.4	Will, following submission of electronic review comments from IDR Members, consolidate and pre-disposition grammatical comments in accordance with SSO procedures prior to IDR meeting.
Proc Spec or Recorder	5.9.2.5	Shall, in coordination with Proc OC and SSO Advisor, determine the necessary functional area expert concurrences required for MSFC Form 1407 to signify conclusion of IDR and prepare form accordingly.
IDR Members	5.9.2.6	<p>a. Will attend IDR meeting to conduct tabletop review of documents and disposition all remaining open comments.</p> <p>b. IDR meeting shall not occur without required core members present.</p> <p>c. Core member meeting functions will be conducted in accordance with 5.9.2.2 notations.</p> <p>d. Will, relative to their functional area of expertise, advise the Proc OC if their individual concurrence will be given following the disposition of all comments attributable to their review, or if their concurrence will be dependent upon</p>

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		the RDT Members/SEB Members incorporating dispositioned changes into the documents reviewed.  e. Will, relative to the functional area experts who are agreeable to conclude their IDR review based upon the disposition of all comments attributable to their review, sign their individual concurrence on MSFC Form 1407.
RDT Members or SEB Members	5.9.2.7	Shall, in coordination with Proc OC, incorporate document revisions necessary to conclude IDR meeting.
Proc OC	5.9.2.8	a. Will, in coordination with the RDT Lead/SEB Chair, make a determination of actions necessary to conclude the IDR, predicated upon:  (1) Disposition of all IDR comments.  <i>Note: Should any IDR Members have comments that are not fully resolved at IDR, these comments should be documented and submitted to DRB for continued review.</i>  (2) Documents reviewed are completed in accordance with IDR expectations specific to Appendix E.4.  (3) Remaining concurrences are obtained for all functional area experts on MSFC Form 1407 necessary to conclude IDR meeting.  b. Will, upon determination of conclusion of the IDR, approve the completed IDR on MSFC Form 1407.

### 5.9.3 Conduct DRB

Actionee		Action
Proc Spec or Recorder	5.9.3.1	Will coordinate schedules of DRB Primary Members and arrange the time and location of formal DRB meeting.
DRB Primary Members	5.9.3.2	Will, if unable to attend and elect to send a designee, directly notify the RDT Lead or SEB Chair with the name of the alternate DRB Primary Member.
RDT Lead or SEB Chair	5.9.3.3	Will, with the assistance of the Proc Spec or Recorder, confirm that all DRB participants (detailed in Section 5.9.3.4 below) have been cleared by the Office of the General Counsel of any known or potential COIs.
Proc Spec or Recorder	5.9.3.4	a. Shall ensure the scheduled DRB can be attended by required core DRB members at the time of scheduling.  b. Will, for the PSM Briefing Charts, in accordance with SSO procedures and Appendix E.1, provide a meeting

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		<p>notification and electronic distribution of applicable documents for review/comment to the following DRB Primary Members:</p> <p>(1) Proc OM (or designee).</p> <p><i>Note: Core member; chairs the DRB meeting.</i></p> <p>(2) RDT Members.</p> <p><i>Note: Quorum constitutes core with RDT Lead and Proc Spec being mandatory core members; document review comments are not anticipated from RDT Members; RDT Lead is primary meeting presenter; Proc Spec is supplemental meeting presenter.</i></p> <p>(3) SSO OM (or designee).</p> <p><i>Note: Core member.</i></p> <p>Legal Representative.</p> <p><i>Note: Core member.</i></p> <p>(4) Req Org Senior Technical Representative.</p> <p><i>Note: Core member.</i></p> <p>(5) PS10 Office Manager (hereafter referred to as “Policy OM”).</p> <p>c. Will, for the PSM Briefing Charts, in accordance with SSO procedures, provide a meeting notification and electronic distribution of applicable documents for informational purposes only to the supporting DRB Members:</p> <p>(1) Proc OC.</p> <p>(2) SSO Advisor.</p> <p>(3) Legal Representative.</p> <p>(4) Req Org Representative.</p> <p>(5) Policy Representative.</p>
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		<p><i>Note: Support as needed should any open IDR comments remain that are specific to PS10's functional area of expertise.</i></p> <p>(6) CFO Representative.</p> <p><i>Note: Support as needed should any open IDR comments remain that are specific to CFO's functional area of expertise.</i></p> <p>(7) OCIO Representative.</p> <p><i>Note: Support as needed should any open IDR comments remain that are specific to OCIO's functional area of expertise.</i></p> <p>(8) Supplemental advisors germane to the acquisition.</p> <p><i>Note: While involvement of supplemental advisors is not anticipated, should any open IDR comments remain that are specific to any functional areas of expertise, support from those advisors should continue at the DRB level.</i></p> <p>d. Will, for the DRFP and RFP, in accordance with SSO procedures and Appendix E.1, provide a meeting notification and electronic distribution of applicable documents for review/comment to the following DRB Primary Members:</p> <p>(1) Proc OM (or designee).</p> <p><i>Note: Core member; chairs the DRB meeting.</i></p> <p>(2) RDT Members/SEB Members.</p> <p><i>Note: Quorum constitutes core with RDT Lead/SEB Chair and Proc Spec/Proc Mbr being mandatory core members; document review comments are not anticipated from RDT Members/SEB Members; RDT Lead/SEB Chair is primary meeting presenter; Proc Spec/Proc Mbr is supplemental meeting presenter.</i></p> <p>(3) SSO OM (or designee).</p> <p><i>Note: Core member.</i></p> <p>(4) Legal Representative.</p>
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		<p><i>Note: Core member.</i></p> <p>(5) Req Org Senior Technical Representative.</p> <p><i>Note: Core member.</i></p> <p>(6) Policy OM.</p> <p>(7) Lead Cost/Price Analyst.</p> <p>e. Will, for the DRFP and RFP, in accordance with SSO procedures, provide a meeting notification and electronic distribution of applicable documents for informational purposes only to the supporting DRB Members:</p> <p>(1) Proc OC.</p> <p>(2) SSO Advisor.</p> <p>(3) Legal Representative.</p> <p>(4) Req Org Representative.</p> <p>(5) Policy Representative.</p> <p><i>Note: Support as needed should any open IDR comments remain that are specific to PS10's functional area of expertise.</i></p> <p>(6) CFO Representative.</p> <p><i>Note: Support as needed should any open IDR comments remain that are specific to CFO's functional area of expertise.</i></p> <p>(7) OCIO Representative.</p> <p><i>Note: Support as needed should any open IDR comments remain that are specific to OCIO's functional area of expertise.</i></p> <p>(8) Cost/Price Analyst.</p> <p>(9) Supplemental advisors germane to the acquisition.</p> <p><i>Note: While involvement of supplemental advisors is not anticipated, should any open IDR comments remain that</i></p>
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		<p><i>are specific to any functional areas of expertise, support from those advisors should continue at the DRB level.</i></p> <p>f. Will, for the Initial Findings Presentation and Final Findings Presentation, in accordance with SSO procedures and Appendix E.1, provide a meeting notification and electronic distribution of applicable documents for review/comment to the following DRB Primary Members:</p> <p>(1) Proc OM (or designee).</p> <p><i>Note: Core member; chairs the DRB meeting.</i></p> <p>(2) SEB Members.</p> <p><i>Note: Quorum constitutes core with SEB Chair and Proc Mbr being mandatory core members; document review comments are not anticipated from SEB Members; SEB Chair is primary meeting presenter; Proc Mbr is supplemental meeting presenter.</i></p> <p>(3) SSO OM (or designee).</p> <p><i>Note: Core member.</i></p> <p>(4) Legal Representative.</p> <p><i>Note: Core member.</i></p> <p>(5) Req Org Senior Technical Representative.</p> <p><i>Note: Core member.</i></p> <p>(6) Lead Cost/Price Analyst.</p> <p>g. Will, for the Initial Findings Presentation and Final Findings Presentation, in accordance with SSO procedures, provide a meeting notification and electronic distribution of applicable documents for informational purposes only to the supporting DRB Members:</p> <p>(1) Proc OC.</p> <p>(2) SSO Advisor.</p> <p>(3) Legal Representative.</p>
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		<p>(4) Req Org Representative.</p> <p>(5) CFO Representative.</p> <p><i>Note: Support as needed should any open IDR comments remain that are specific to CFO's functional area of expertise.</i></p> <p>(6) OCIO Representative.</p> <p><i>Note: Support as needed should any open IDR comments remain that are specific to OCIO's functional area of expertise.</i></p> <p>(7) Cost/Price Analyst.</p> <p>(8) Supplemental advisors germane to the acquisition.</p> <p><i>Note: While involvement of supplemental advisors is not anticipated, should any open IDR comments remain that are specific to any functional areas of expertise, support from those advisors should continue at the DRB level.</i></p>
DRB Primary Members	5.9.3.5	<p>a. Will conduct DRB documents review and provide electronic comments in accordance with Appendix E.1 timeline.</p> <p><i>Note: Comments provided should be succinct but sufficiently detailed to be actionable by RDT Member/SEB Members (e.g., where applicable, include recommended to include from/to language).</i></p> <p>b. Will, for PSM Briefing Charts, at a minimum, evaluate all documents in accordance with Appendix F.1.2.</p> <p>c. Will, for DRFP and RFP, at a minimum, evaluate all applicable documents in accordance with Appendix F.2.2.</p> <p>d. Will, for Initial Findings Presentation and Final Findings Presentation, at a minimum, evaluate all documents in accordance with Appendix F.3.2.</p> <p>e. Will notify the Proc OM in the event a DRB package does not appear to have satisfied IDR expectations in accordance with Appendix E.4.</p>
Proc OM	5.9.3.6	Will, in the event a DRB package does not appear to have satisfied IDR expectations, inform the Proc OC and RDT

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		Lead/SEB Chair of any required rework and provide them further guidance to inform DRB Members of appropriate DRB rescheduling following IDR rework.
RDT Members or SEB Members	5.9.3.7	Will, following submission of electronic review comments from DRB Primary Members, consolidate and pre-disposition any remaining grammatical comments in accordance with SSO procedures prior to DRB meeting.
Proc Spec or Recorder	5.9.3.8	<p>a. Will, with the assistance of the RDT Lead/SEB Chair, based on the advice from the Proc OM's assessment of the DRB package, establish a tentative date for the follow-on document review procedures (i.e., PSM or CRT meeting, applicable to either the RDT or SEB document review procedures).</p> <p>b. Shall prepare MSFC Form 1407 to capture DRB Primary Member concurrences.</p>
DRB Members	5.9.3.9	<p>a. Will attend DRB meeting to conduct tabletop review of documents and disposition all remaining open comments.</p> <p>b. DRB meeting shall not occur without required core members present.</p> <p>c. Core member meeting functions will be conducted in accordance with 5.9.3.4 notations.</p>
DRB Primary Members	5.9.3.10	<p>a. Will, relative to their functional area of expertise, advise the Proc OM if their individual concurrence will be given following the disposition of all comments attributable to their review, or if their concurrence will be dependent upon the RDT Members/SEB Members successfully incorporating dispositioned changes into the documents reviewed.</p> <p>b. Will, relative to the functional area experts who are agreeable to conclude their DRB review based upon the disposition of all comments attributable to their review, provide individual concurrence on MSFC Form 1407.</p>
RDT Members or SEB Members	5.9.3.11	Shall, in coordination with Proc OM, incorporate document revisions necessary to conclude DRB meeting.
Proc OM	5.9.3.12	<p>a. Will, in coordination with the RDT Lead/SEB Chair, make a determination of actions necessary to conclude the DRB, predicated upon:</p> <p>(1) Disposition of all DRB comments.</p> <p><i>Note: Should any DRB Members have comments that are not fully resolved at DRB, these comments should be</i></p>

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		<p><i>documented and submitted to CRT (or PSM if applicable) for continued review.</i></p> <p>(2) Documents reviewed are complete in accordance with DRB expectations specific to Appendix E.4.</p> <p>(3) Remaining concurrences are obtained for all DRB Primary Members on MSFC Form 1407 necessary to conclude DRB meeting.</p> <p>b. Will, upon determination of conclusion of the DRB, approve the completed DRB on MSFC Form 1407.</p>
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#### 5.9.4 Conduct PSM

Actionee		Action
Proc Spec or Recorder	5.9.4.1	Will coordinate schedules of PSM Primary Members and arrange the time and location of formal PSM.
PSM Primary Members	5.9.4.2	Will, if unable to attend and elect to send a designee, directly notify the RDT Lead with the name of the alternate PSM Primary Member.
RDT Lead	5.9.4.3	Will, with the assistance of the Proc Spec or Recorder, confirm all PSM participants (detailed in Section 5.9.4.4 below) have been cleared by the Office of the General Counsel of any known or potential COIs.
Proc Spec or Recorder	5.9.4.4	<p>a. Shall ensure the scheduled PSM can be attended by required core PSM members at the time of scheduling.</p> <p>b. Will, in accordance with SSO procedures and Appendix E.1, provide a meeting notification and electronic distribution of applicable documents to the following PSM Primary Members:</p> <p>(1) Proc Officer.</p> <p><i>Note: Core member; chairs the PSM.</i></p> <p>(2) RDT Members.</p> <p><i>Note: Quorum constitutes core with RDT Lead and Proc Spec being mandatory core members; RDT Lead is primary meeting presenter; Proc Spec is supplemental meeting presenter.</i></p> <p>(3) Req Org Director (or designee).</p>

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		<p><i>Note: Core member.</i></p> <p>(4) Legal Representative.</p> <p><i>Note: Core member.</i></p> <p>(5) CFO (or designee).</p> <p><i>Note: Core member.</i></p> <p>(6) Proc OM.</p> <p><i>Note: Core member.</i></p> <p>(7) OCIO Director (or designee).</p> <p>(8) Supplemental Office Directors germane to the acquisition (e.g., SMA Director (or designee), et al.).</p> <p><i>Note: Supplemental Office Directors should be invited based on the content of the acquisition subject to their directorate's involvement with the acquisition; it is not intended nor anticipated that directorates not associated with the acquisition support this meeting.</i></p> <p>(9) Deputy Proc Officer.</p> <p>(10) SSO OM.</p> <p>c. Will, in accordance with SSO procedures, provide a meeting notification and electronic distribution of applicable documents for informational purposes only to the supporting PSM Members:</p> <p>(1) Proc OC.</p> <p>(2) SSO Advisor.</p> <p>(3) Req Org Senior Technical Representative.</p> <p>(4) CFO Representative.</p> <p><i>Note: Support as needed should any open DRB comments remain that are specific to CFO's functional area of expertise.</i></p>
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		<p>(5) OCIO Representative.</p> <p><i>Note: Support as needed should any open DRB comments remain that are specific to OCIO's functional area of expertise.</i></p> <p>(6) Supplemental advisors germane to the acquisition.</p> <p><i>Note: While involvement of supplemental advisors is not anticipated, should any open DRB comments remain that are specific to any functional areas of expertise, support from those advisors should continue at the PSM level.</i></p>
PSM Primary Members	5.9.4.5	Will, at a minimum, evaluate all documents in accordance with Appendix F.1.3.
PSM Members	5.9.4.6	<p>a. Will attend PSM to conduct tabletop review of documents and disposition any remaining open DRB comments.</p> <p>b. PSM meeting shall not occur without required core members present.</p> <p>c. Core member meeting functions will be conducted in accordance with 5.9.4.4 notations.</p>
Proc Spec or Recorder	5.9.4.7	Shall record PSM Primary Member comments and any RDT actions assigned during the PSM for eventual disposition in the PSM Minutes.
PSM Primary Members	5.9.4.8	Will, relative to their functional area of expertise, advise the Proc Officer if their individual concurrence will be given following the disposition of all comments/actions attributable to their review.
Proc Officer	5.9.4.9	<p>a. Will, in coordination with PSM Primary Members in attendance, assign RDT actions necessary to conclude the PSM, predicated upon the eventual disposition of all PSM comments/actions in the PSM Minutes.</p> <p>b. Will, upon responses from PSM Primary Members in attendance, conclude the PSM.</p> <p><i>Note: MSFC Form 1407 signatures are not required at the conclusion of the PSM. Appropriate signatures will instead be captured on a MSFC Form 1407 when routing PSM Minutes for approval.</i></p>
RDT Members	5.9.4.10	a. Shall prepare formal minutes, utilizing an approved procurement template, to officially document all germane comments/actions from the PSM.

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		<p>b. Shall update the PSM Briefing Charts to align with dispositioned comments/actions in the PSM Minutes that necessitated changes.</p> <p>c. Shall route PSM Briefing Charts and PSM Minutes for final approval in accordance Appendix E.4 and PS-OWI-05.</p> <p><i>Note: The PSM Briefing Charts (post any changes made following the PSM) and the approved PSM Minutes serve as the formal acquisition plan.</i></p>
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### 5.9.5 Conduct CRT

Actionee		Action
Recorder	5.9.5.1	Will coordinate schedules of CRT Primary Members and arrange the time and location of formal CRT meeting.
CRT Primary Members	5.9.5.2	Will, if unable to attend and elect to send a designee, directly notify the SEB Chair with the name of the alternate CRT Primary Member.
SEB Chair	5.9.5.3	Will, with the assistance of the Recorder, confirm all CRT participants (detailed in Section 5.9.5.4 below) have been cleared by the Office of the General Counsel of any known or potential COIs.
Recorder	5.9.5.4	<p>a. Shall ensure the scheduled CRT can be attended by required core CRT members at the time of scheduling.</p> <p>b. Will, for the DRFP and RFP, in accordance with SSO procedures and Appendix E.1, provide a meeting notification and electronic distribution of applicable documents to the following CRT Primary Members:</p> <p>(1) Proc Officer (or Deputy Proc Officer as designee, or Deputy Proc Officer when Proc Officer is SSA).</p> <p><i>Note: Core member; chairs the CRT meeting.</i></p> <p>(2) SEB Members.</p> <p><i>Note: Quorum constitutes core with SEB Chair and Proc Mbr being mandatory core members; SEB Chair is primary meeting presenter; Proc Mbr is supplemental meeting presenter.</i></p> <p>(3) Req Org Director (or designee).</p>



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		<p><i>Note: Core member.</i></p> <p>(4) General Counsel (or designee).</p> <p><i>Note: Core member.</i></p> <p>(5) CFO (or designee).</p> <p><i>Note: Core member.</i></p> <p>(6) Proc OM.</p> <p><i>Note: Core member.</i></p> <p>(7) OCIO Director (or designee).</p> <p>(8) Supplemental Office Directors germane to the acquisition (e.g., SMA Director (or designee), et al.).</p> <p><i>Note: Supplemental Office Directors should be invited based on the content of the acquisition subject to their directorate's involvement with the acquisition; it is not intended nor anticipated that directorates not associated with the acquisition support this meeting.</i></p> <p>(9) Deputy Proc Officer.</p> <p>(10) SSO OM.</p> <p>(11) Lead Cost/Price Analyst.</p> <p>c. Will, for the DRFP and RFP, in accordance with SSO procedures, provide a meeting notification and electronic distribution of applicable documents for informational purposes only to the supporting CRT Members:</p> <p>(1) Proc OC.</p> <p>(2) SSO Advisor.</p> <p>(3) Legal Representative.</p> <p>(4) Req Org Senior Technical Representative.</p> <p>(5) CFO Representative.</p>
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		<p><i>Note: Support as needed should any open DRB comments remain that are specific to CFO's functional area of expertise.</i></p> <p>(6) OCIO Representative.</p> <p><i>Note: Support as needed should any open DRB comments remain that are specific to OCIO's functional area of expertise.</i></p> <p>(7) Cost/Price Analyst.</p> <p>(8) Supplemental advisors germane to the acquisition.</p> <p><i>Note: While involvement of supplemental advisors is not anticipated, should any open DRB comments remain that are specific to any functional areas of expertise, support from those advisors should continue at the CRT level.</i></p> <p>d. Will, for the Initial Findings Presentation and Final Findings Presentation, in accordance with SSO procedures and Appendix E.1, provide a meeting notification and electronic distribution of applicable documents for review to the following CRT Primary Members:</p> <p>(1) Proc Officer (or Deputy Proc Officer as designee, or Deputy Proc Officer when Proc Officer is SSA).</p> <p><i>Note: Core member; chairs the CRT meeting.</i></p> <p>(2) SEB Members.</p> <p><i>Note: Quorum constitutes core with SEB Chair and Proc Mbr being mandatory core members; SEB Chair is primary meeting presenter; Proc Mbr is supplemental meeting presenter.</i></p> <p>(3) Req Org Director (or designee).</p> <p><i>Note: Core member.</i></p> <p>(4) General Counsel (or designee).</p> <p><i>Note: Core member.</i></p> <p>(5) CFO (or designee).</p>
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		<p><i>Note: Core member.</i></p> <p>(6) Proc OM.</p> <p><i>Note: Core member.</i></p> <p>(7) OCIO Director (or designee).</p> <p>(8) Supplemental Office Directors germane to the acquisition (e.g., SMA Director (or designee), et al.).</p> <p><i>Note: Supplemental Office Directors should be invited based on the content of the acquisition subject to their directorate's involvement with the acquisition; it is not intended nor anticipated that directorates not associated with the acquisition support this meeting.</i></p> <p>(9) Deputy Proc Officer.</p> <p>(10) SSO OM.</p> <p>(11) Lead Cost/Price Analyst.</p> <p>e. Will, for the Initial Findings Presentation and Final Findings Presentation, in accordance with SSO procedures, provide a meeting notification and electronic distribution of applicable documents for informational purposes only to the supporting CRT Members:</p> <p>(1) Proc OC.</p> <p>(2) SSO Advisor.</p> <p>(3) Legal Representative.</p> <p>(4) Req Org Senior Technical Representative.</p> <p>(5) CFO Representative.</p> <p><i>Note: Support as needed should any open DRB comments remain that are specific to CFO's functional area of expertise.</i></p> <p>(6) OCIO Representative.</p>
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		<p><i>Note: Support as needed should any open DRB comments remain that are specific to OCIO's functional area of expertise.</i></p> <p>(7) Cost/Price Analyst.</p> <p>(8) Supplemental advisors germane to the acquisition.</p> <p><i>Note: While involvement of supplemental advisors is not anticipated, should any open DRB comments remain that are specific to any functional areas of expertise, support from those advisors should continue at the CRT level.</i></p>
CRT Primary Members	5.9.5.5	<p>a. Will, for DRFP and RFP, at a minimum, evaluate all applicable documents in accordance with Appendix F.2.3.</p> <p>b. Will, for Initial Findings Presentation and Final Findings Presentation, at a minimum, evaluate all documents in accordance with Appendix F.3.3.</p>
Recorder	5.9.5.6	<p>a. Shall prepare MSFC Form 1407 to obtain CRT Primary Member concurrences.</p> <p>b. Will consult the SSA's calendar to ascertain potential executive session dates for final approval of applicable documents.</p>
CRT Members	5.9.5.7	<p>a. Will attend CRT to conduct tabletop review of documents and disposition any remaining open DRB comments.</p> <p>b. CRT meeting shall not occur without required core members present.</p> <p>c. Core member meeting functions will be conducted in accordance with 5.9.5.4 notations.</p>
Proc Spec or Recorder	5.9.5.8	<p>a. Shall, for DRFP and RFP, record CRT Primary Member comments and any SEB actions assigned during the CRT that require SEB dispositioning.</p> <p>b. Shall, for Initial Findings Presentation and Final Findings Presentation, record CRT Primary Member germane comments to be considered by the SEB.</p>
CRT Primary Members	5.9.5.9	<p>a. Will, for DRFP and RFP, relative to their functional area of expertise:</p> <p>(1) Advise the Proc Officer (or Deputy Proc Officer when Proc Officer is SSA) if their individual concurrence will be</p>

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		<p>given following the disposition of all comments/actions attributable to their review.</p> <p>(2) Provide individual concurrence on MSFC Form 1407 upon the Proc Officer (or Deputy Proc Officer when Proc Officer is SSA) concluding the CRT meeting.</p> <p>b. Will, for Initial Findings Presentation and Final Findings Presentation, relative to their functional area of expertise:</p> <p>(1) Advise the Proc Officer (or Deputy Proc Officer when Proc Officer is SSA) if their individual concurrence will be given following consideration of comments by the SEB.</p> <p>(2) Provide individual concurrence on MSFC Form 1407 upon the Proc Officer (or Deputy Proc Officer when Proc Officer is SSA) concluding the CRT meeting.</p>
SEB Members	5.9.5.10	Shall, in coordination with Proc Officer, incorporate document revisions necessary to conclude CRT meeting.
Proc Officer (or Deputy Proc Officer as designee, or Deputy Proc Officer when Proc Officer is SSA)	5.9.5.11	<p>a. Will, in coordination with the SEB Chair, determine actions necessary to conclude the CRT, predicated upon:</p> <p>(1) Disposition of all CRT comments.</p> <p>(2) Documents reviewed are complete in accordance with CRT expectations specific to Appendix E.4.</p> <p>(3) Remaining concurrences are obtained for all CRT Primary Members on MSFC Form 1407 necessary to conclude CRT meeting.</p> <p>b. Will, upon determination of conclusion of the CRT:</p> <p>(1) Approve completed CRT on MSFC Form 1407.</p> <p>(2) For DRFP and RFP, inform the SEB Chair if an executive session will be held with the SSA for final approval of the applicable documents, or if SSA approval will be obtained via alternate means.</p> <p>(3) For Initial Findings Presentation and Final Findings Presentation, direct the SEB Chair to schedule an executive session with the SSA for final approval of the applicable documents.</p>

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	(4) Provide SEB Chair with the names of any supplemental personnel required to attend any SSA Executive Session.
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#### 5.9.6 Obtain SSA Approval, SSD, or Competitive Range Determination

Actionee		Action
SEB Members	5.9.6.1	Shall ensure outstanding post-CRT comments required for incorporation into either the DRFP, RFP, Initial Findings Presentation, or Final Findings Presentation have been made prior to tendering the applicable documents for SSA approval, SSD, or a competitive range determination.
Proc Mbr	5.9.6.2	Shall, for Initial Findings Presentation and Final Findings Presentation, review and reaffirm that all offerors do not have any active exclusions listed in SAM that would prevent them from eligibility for potential award of the solicitation.
Recorder	5.9.6.3	Will, for an SSA Executive Session resulting from 5.9.5.11, coordinate schedules of the SSA and SSA Executive Session Members to arrange the time and location to present documents to the SSA for review/final approval or to make an SSD or competitive range determination.
SSA Executive Session Members	5.9.6.4	Will, if an SSA Executive Session is to be held, if unable to attend and instead elect to send a designee, directly notify the SEB Chair with the name of the alternate SSA Executive Session Member.
SEB Chair	5.9.6.5	Will, if an SSA Executive Session is to be held, with the assistance of the Recorder, confirm all SSA Executive Session participants (detailed in Section 5.9.6.6 below) have been cleared by the Office of the General Counsel of any known or potential COIs.
Recorder	5.9.6.6	<p>a. Shall, if an SSA Executive Session is to be held, ensure the scheduled SSA Executive Session can be attended by required core SSA Executive Session members at the time of scheduling.</p> <p>b. Will, if an SSA Executive Session is to be held for the DRFP and RFP, in accordance with SSO procedures and Appendix E.1, provide a meeting notification and electronic distribution of applicable documents to the following SSA Executive Session Members:</p> <p>(1) SSA.</p> <p><i>Note: Core member; chairs the SSA meeting.</i></p>

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		<p>(2) SEB Members.</p> <p><i>Note: Quorum constitutes core with SEB Chair and Proc Mbr being mandatory core members; SEB Chair is primary meeting presenter; Proc Mbr is supplemental meeting presenter.</i></p> <p>(3) Proc Officer (or Deputy Proc Officer as designee, or Deputy Proc Officer when Proc Officer is SSA).</p> <p><i>Note: Core member.</i></p> <p>(4) Req Org Director (or designee).</p> <p><i>Note: Core member.</i></p> <p>(5) General Counsel (or designee).</p> <p><i>Note: Core member.</i></p> <p>(6) CFO (or designee).</p> <p><i>Note: Core member.</i></p> <p>(7) Proc OM.</p> <p><i>Note: Core member.</i></p> <p>(8) OCIO Director (or designee).</p> <p>(9) Supplemental Office Directors germane to the acquisition (e.g., SMA Director (or designee), et al.) as determined by the Proc Officer (or Deputy Proc Officer when Proc Officer is SSA) at the conclusion of the CRT.</p> <p>(10) Deputy Proc Officer (when Proc Officer is not SSA).</p> <p>(11) Lead Cost/Price Analyst.</p> <p>(12) SSO OM.</p> <p><i>Note: Serves in a supporting role.</i></p> <p>(13) SSO Advisor.</p> <p><i>Note: Serves in a supporting role.</i></p>
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		<p>(14) Supplemental advisors germane to the acquisition as determined by the Proc Officer (or Deputy Proc Officer when Proc Officer is SSA) at the conclusion of the CRT.</p> <p><i>Note: Serve in a supporting role.</i></p> <p>c. Will, if an SSA Executive Session will not be held for the DRFP and RFP, in accordance with Proc Officer instructions from 5.9.5.11 (or Deputy Proc Officer as designee, or Deputy Proc Officer when Proc Officer is SSA), provide electronic distribution of applicable documents to the appropriate personnel for SSA approval.</p> <p>d. Will, for the Initial Findings Presentation and Final Findings Presentation, in accordance with SSO procedures and Appendix E.1, provide a meeting notification and electronic distribution of applicable documents to the following SSA Executive Session Members:</p> <p>(1) SSA.</p> <p><i>Note: Core member; chairs the SSA meeting.</i></p> <p>(2) SEB Members.</p> <p><i>Note: Core members; SEB Chair is the primary meeting presenter; Proc Mbr is supplemental meeting presenter.</i></p> <p>(3) Proc Officer (or Deputy Proc Officer when Proc Officer is SSA).</p> <p><i>Note: Core member.</i></p> <p>(4) Req Org Director (or designee).</p> <p><i>Note: Core member.</i></p> <p>(5) General Counsel (or designee).</p> <p><i>Note: Core member.</i></p> <p>(6) CFO (or designee).</p> <p><i>Note: Core member.</i></p> <p>(7) Proc OM.</p>
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		<p><i>Note: Core member.</i></p> <p>(8) Legal Representative.</p> <p><i>Note: Core member for Initial Findings Presentation or Final Findings Presentation, otherwise serves in a supporting role.</i></p> <p>(9) OCIO Director (or designee).</p> <p>(10) Supplemental Office Directors germane to the acquisition (e.g., SMA Director (or designee), et al.) as determined by the Proc Officer (or Deputy Proc Officer when Proc Officer is SSA) at the conclusion of the CRT.</p> <p>(11) Deputy Proc Officer.</p> <p><i>Note: Serves in a supporting role.</i></p> <p>(12) Lead Cost/Price Analyst.</p> <p>(13) SSO OM.</p> <p><i>Note: Serves in a supporting role.</i></p> <p>(14) Proc OC.</p> <p><i>Note: Serves in a supporting role.</i></p> <p>(15) SSO Advisor.</p> <p><i>Note: Serves in a supporting role.</i></p> <p>(16) Supplemental advisors germane to the acquisition as determined by the Proc Officer (or Deputy Proc Officer when Proc Officer is SSA) at the conclusion of the CRT.</p> <p><i>Note: Serves in a supporting role.</i></p>
SSA	5.9.6.7	Will review applicable documents for final approval or in the case of an Initial Findings Presentation or Final Findings Presentation, for an SSD or concurrence on a competitive range determination.
Recorder	5.9.6.8	<p>Shall, for DRFP and RFP release, prepare MSFC Form 1407 to obtain SSA approval.</p> <p><i>Note: If an SSA Executive Session will not be held for DRFP or RFP, the CRT's signed MSFC Form 1407 can</i></p>

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		<i>be used as an attachment to a supplemental MSFC Form 1407 in obtaining the SSA's approval. For Initial Findings Presentations and Final Findings Presentations, a MSFC Form 1407 will not be necessary, given SSA approval will instead be obtained when routing either the competitive range determination or SSS for approval in accordance with PS-OWI-05.</i>
SSA Executive Session Members	5.9.6.9	<p>a. Will, if an SSA Executive Session is to be held, attend the SSA Executive Session to present documents for SSA review and final approval, or for the SSA to make an SSD, or for the Proc OM and SSA to make a competitive range determination.</p> <p>b. SSA Executive Session, when held, shall not occur without required core members present.</p> <p>c. Core member meeting functions will be conducted in accordance with 5.9.6.6 notations.</p> <p>d. Will, relative to their functional area of expertise:</p> <p>(1) Respond to SSA questions and comments.</p> <p>(2) Advise the SSA relative to their review and individual concurrence of the applicable documents.</p> <p>e. Provide individual concurrence on the MSFC Form 1407 for final document approval, reaffirming their CRT-level concurrence, or for an Initial Findings Presentation or Final Findings Presentation, provide any comments to SSA, as solicited, relative to counseling the SSA on an SSD or providing the Proc OM and SSA advice on a competitive range determination.</p>
SSA	5.9.6.10	<p>Will, for Initial Findings Presentation:</p> <p>a. Determine whether any proposal is clearly superior to all others and whether continuing the SEB process would provide any meaningful benefit to the Agency before opting to proceed directly to contract award without establishing a competitive range or conducting discussions.</p> <p><i>Note: The Initial Findings Presentation serves as the basis for an SSD (subsequently documented in an SSS) if the SSA identifies a clearly superior proposal based on the initial evaluation, findings, and presentation. In the event the SSA does not make an SSD based on the initial</i></p>

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		<p><i>evaluation, findings, and presentation, the Initial Findings Presentation serves as the basis for the Proc OM and SSA's establishment of a competitive range (subsequently documented in a competitive range determination).</i></p> <p>b. Not select a proposal for award without discussions when the proposal contains significant weaknesses, weaknesses, or deficiencies that require correction before contract award or has any unacceptable contract deviations or exceptions.</p> <p>c. Determine whether to reject all proposals received in response to the solicitation, if doing so is in the best interest of the Government.</p>
SSA	5.9.6.11	<p>Will, for DRFP and RFP release, sign the MSFC Form 1407 when final approval is given to proceed, along with any applicable instructions relative to the approval, and ensure the form is promptly returned to the SEB.</p> <p><i>Note: If an SSA Executive Session will not be held for DRFP or RFP release, the SSA's approval may be electronically obtained.</i></p>
SEB Members	5.9.6.12	<p>a. Will, for Initial Findings Presentation, if the Proc OM and SSA establish a competitive range rather than the SSA making an SSD, proceed to 5.6.</p> <p>b. Will, for Initial Findings Presentation or Final Findings Presentation, if the SSA elects to make an SSD, proceed to 5.7.</p>

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#### 5.10 Records Security

Actionee		Action
Office of Procurement		<p>a. Will limit access to RDT and SEB records to authorized personnel.</p> <p>b. Will maintain RDT and SEB records in accordance with Appendix D.</p> <p>c. Will consolidate SEB records with the related official contract file at the time the administrating contracting officer readies the contract for closeout.</p>

### 6. CANCELLATION

MWI 5115.2H-1, Procurement Development Team (PDT) and Source Evaluation Board (SEB) Process, dated April 13, 2020.

*Electronically approved by*

Jody Singer  
Director

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## APPENDIX A - DEFINITIONS

Center Review Team (CRT). Senior Center managers who provide guidance to the SEB for the overall acquisition effort by conducting final reviews of acquisition-related documents generated by the SEB prior to their presentation to the SSA.

Document Review Board (DRB). A group of management-level individuals who conduct a second-level comprehensive review of acquisition-related documents generated by the RDT or SEB, to validate document quality, completeness, and compliance with current policies and regulations prior to submission to either the follow-on source selection process or CRT.

Initial Document Review (IDR). A group of senior-level individuals who conduct the initial comprehensive review of acquisition-related documents generated by the RDT or SEB to ensure overall document quality, completeness, and compliance with current policies and regulations prior to submission to the DRB.

Procurement Member (Proc Mbr). SEB Member from the Office of Procurement; can be designated by the SSA as either an SEB voting or non-voting member.

Recorder. Non-voting SEB Member who functions as the principal administrative assistant to the SEB, providing logistical support, document control, and record-keeping services.

Requirements Development Team (RDT). A team of qualified management, technical, scientific, contracting, and business personnel dedicated to strategically aligning specialized requirements with an appropriate acquisition strategy and the initial development of the solicitation.

RDT Lead. Individual in charge of all RDT activities. Convenes and presides at all RDT meetings and coordinates the timing of all RDT activities in order to meet overall RDT schedule requirements.

Source Evaluation Board (SEB). The competitive acquisition process utilized by NASA in accordance with NFS 1815.370.

SEB Chairperson (SEB Chair). SEB Voting Member in charge of all SEB activities. Convenes and presides at all SEB meetings and coordinates the timing of all SEB activities in order to meet overall SEB schedule requirements.

SEB Committee. A group of SEB Evaluators that function as a fact-finding arm of the core SEB membership, responsible for conducting a comprehensive evaluation of proposals relative to their discipline. SEB Committees may be chaired by either an SEB Voting Member or a non-voting SEB Evaluator as designated by the SEB Chair.

SEB Evaluator. Qualified management, technical, scientific, contracting, and business personnel serving in a non-voting SEB member role, based on key assignments or expert knowledge of the subject acquisition. SEB Evaluators are designated by the SEB Chair.

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SEB Member. Core SEB personnel made up of qualified management, technical, scientific, contracting, and business disciplines, serving in either a voting or non-voting role, based on key assignments or expert knowledge of the subject acquisition. Responsibilities include finalizing and issuing the solicitation in accordance with the approved acquisition strategy, evaluation of proposals, and presentation of findings resulting from proposal evaluation to assist the SSA's decision-making process.

SEB Voting Member. Subset of core SEB personnel, as defined in accordance with NFS 1815.370(e), having voting authority in determining the outcome of SEB consensus activities.

Source Selection Authority (SSA). The senior official responsible for proper and efficient conduct of the source selection process and for making the final source selection decision.

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## APPENDIX B - ACRONYMS

Acronyms may have alternate/additional meanings; the following are utilized in this document:

A	Adequate
ANOSCA	Administrator Notification of Significant Contract Action
APT	Acquisition Planning Tool
ATP	Authority to Proceed
CAGE	Commercial and Government Entity
CDRM	Center Data Requirements Manager
CFR	Code of Federal Regulations
CLIN	Contract Line Item Number
COI	Conflict of Interest
CPARS	Contractor Performance Assessment Reporting System
CRT	Center Review Team
DPD	Data Procurement Document
DRB	Document Review Board
DRD	Data Requirements Description
DRFP	Draft Request for Proposal
DUNS	Data Universal Numbering System
EEO	Equal Employment Opportunity
FAPIS	Federal Awardee Performance and Integrity Information System
FAR	Federal Acquisition Regulation
FPR	Final Proposal Revision
GFP	Government Furnished Property
GPE	Government-wide Point of Entry
GSA	General Services Administration
HCA	Head of the Contracting Activity
IAGP	Installation Accountable Government Property
IDIQ	Indefinite-Delivery Indefinite-Quantity
IDR	Initial Document Review
IGCE	Independent Government Cost Estimate
IT	Information Technology
LPTA	Lowest Price Technically Acceptable
MAF	Michoud Assembly Facility
MBP	Master Buy Plan
MBR	Member
NAICS	North American Industry Classification System
NCWS	NASA Contract Writing System
NFS	NASA FAR Supplement
OC	Office Chief
OCFO	Office of the Chief Financial Officer
OCI	Organizational Conflict of Interest
OCIO	Office of the Chief Information Officer

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OFCCP	Office of Federal Contract Compliance Programs
OM	Office Manager
PEP	Performance Evaluation Plan
PIID	Procurement Instrument Identifier
PP&C	Program Planning and Control
PPTO	Price Performance Tradeoff
PR	Procurement Requisition; Purchase Request/Requisition
PROC	Procurement
PRS	Performance Requirements Summary
PSM	Procurement Strategy Meeting
PWS	Performance Work Statement
REQ ORG	Requiring Organization
RFI	Request for Information
RFP	Request for Proposal
RDT	Requirements Development Team
RTQ	Response to Questions
SAM	System for Award Management
SBS	Small Business Specialist
SEB	Source Evaluation Board
SET	Source Evaluation Team
SF	Standard Form
SHE	Safety, Health, and Environmental
SMA	Safety and Mission Assurance
SME	Subject Matter Expert
SSO	Source Selection Office
SPEC	Specialist
SSA	Source Selection Authority
SSD	Source Selection Decision
SSS	Source Selection Statement
STI	Scientific and Technical Information
SW	Significant Weakness
T	Time
USC	United States Code
VETS	Veterans' Employment and Training Service
WBS	Work Breakdown Structure
WYE	Work Year Equivalent
XML	Extensible Markup Language



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## **APPENDIX C - VERIFICATION MATRIX**

In accordance with PS-OWI-05, Review and Execution of Procurement Documents, Appendix A, Appendix A.1 Notes, as part of the required compliance review and in conjunction with the source evaluation board/source evaluation team, an assessment will be made as to whether the MWI and the steps delineated therein served the intended purpose of facilitating a comprehensive source evaluation, selection, and award.

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## APPENDIX D - RECORDS

D.1 Records relating to the competitive solicitation, evaluation, and selection of a contractor to perform a major contract consist of a wide array of essential procurement file documentation to be retained in the official contract file. These records will include at a minimum: designation of RDT and SEB members; rules for RDT and SEB operations; committee appointments; minutes of RDT, SEB, and committee meetings; files associated with solicitation and receipt of information; offeror's proposals; records on the evaluation process, to include evaluation criteria, specifications, and evaluation findings; and final presentations to the SSA.

*Note: A list reflecting documentation generally included in contract award files as records is available to RDTs/SEBs on the SSO SharePoint site. Each step of the RDT/SEB process should be reflected in the record. Draft documents created at any step in the process which do not represent the final document at that step need not be retained. For example, as a consensus finding may go through several drafts before reaching its final version, there is no need to keep all drafts of the consensus finding. However, individual evaluator finding(s) from which the consensus finding was created must remain in the record as they represent a different step in the process.*

D.2 Records retention requirements for file documentation associated with the RDT and SEB process are set forth in accordance with FAR Subpart 4.8, NFS 1804.8, and NRRS 1441.1 5/13/A, and are to be maintained as part of the official contract file.

D.3 Records will be stored electronically in the order specified on the NASA Form 1098. A File Retention Structure – NASA Form 1098 template is available to facilitate the electronic storage of all applicable documents.

D.4 With the exception of procurement files selected by the Assistant Administrator for Procurement that are unique or precedent setting, RDT and SEB records will be retired and destroyed with the related official contract file six years after final payment or cancellation in accordance with NRRS 1441.1 5/1/A.

D.5 For procurement files selected by the Assistant Administer A for Procurement that are unique or precedent setting, RDT and SEB records will be retired as part of the official contract file to the National Archives ten years after final payment in accordance with NRRS 1441.1 5/1/E/2.

D.6 For any electronic or hardcopy surplus, obsolete, scrap, and waste materials that do not constitute an official record, this excess documentation will be destroyed promptly as warranted, but no later than the conclusion of the RDT and SEB process, as advised by the Proc Spec/Proc Mbr and SSO.

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## APPENDIX E - FIGURES AND TABLES

### E.1 Document Review Timeline

These tables indicate minimum review times for various RDT/SEB Center-level documents. “T-” is the range of time (in full working days) prior to the applicable “T” meeting (example: if “T” occurs on a Friday, then “T-2” would indicate the preceding Wednesday morning).

The following RDT/SEB review procedures solicit electronic comments on documents:

IDR/DRB			
Document	Delivery to IDR/DRB Members	IDR/DRB Members Comments Due	IDR/DRB (T)
PSM Briefing Charts	T-7	T-2	T
RDT DRFP	T-7	T-2	T
SEB DRFP	T-7	T-2	T
RFP	T-7	T-2	T
Initial Findings Review	T-7	T-2	T
Initial Findings Presentation	T-5	T-2	T
Final Findings Presentation	T-5	T-2	T

The following RDT/SEB review procedures do not solicit electronic comments on documents:

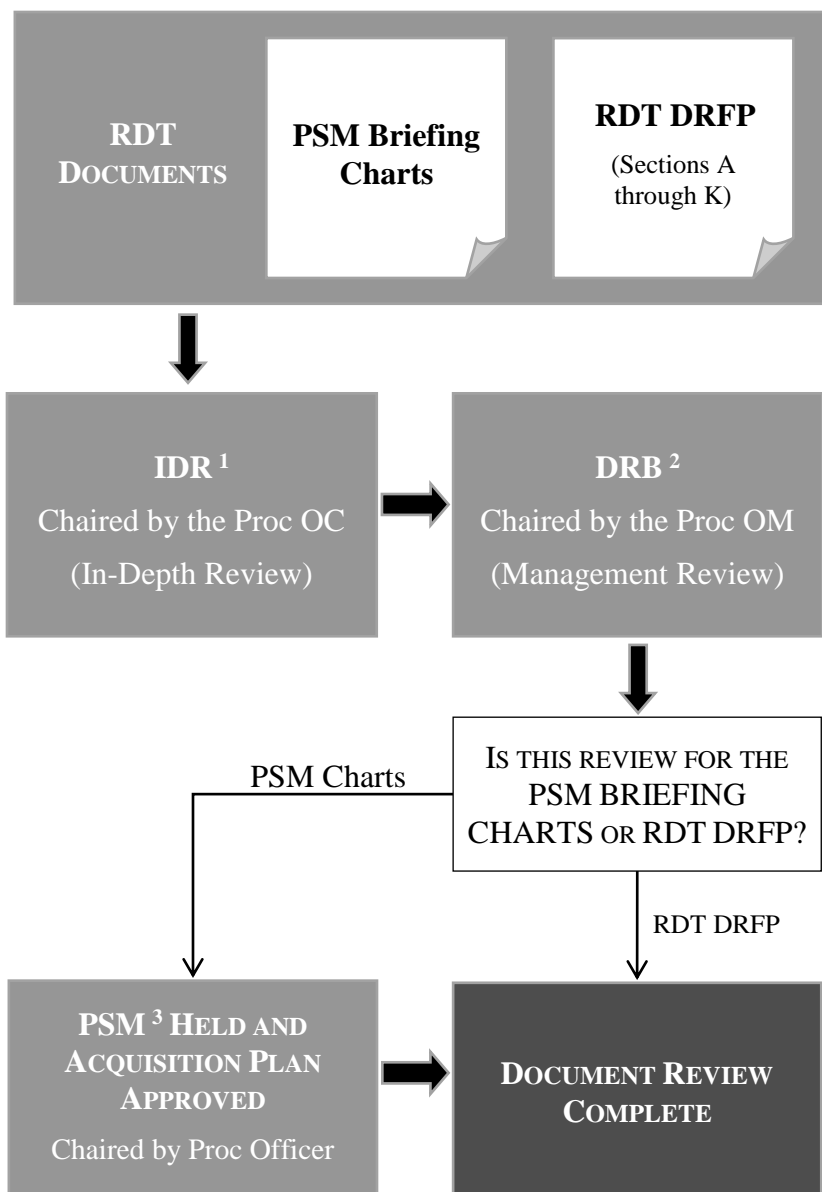
PSM		
Document	Delivery to PSM Members	PSM (T)
PSM Briefing Charts	T-3	T

CRT		
Document	Delivery to CRT Members	CRT (T)
SEB DRFP	T-5	T
RFP	T-3	T
Initial Findings Presentation	T-3	T
Final Findings Presentation	T-3	T

SSA Approval		
Document	Delivery to SSA Executive Session Members	SSA (T)
SEB DRFP	T-2	T
RFP	T-2	T
Initial Findings Presentation	T-3	T
Final Findings Presentation	T-3	T

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## E.2 RDT Document Review Flow-Chart



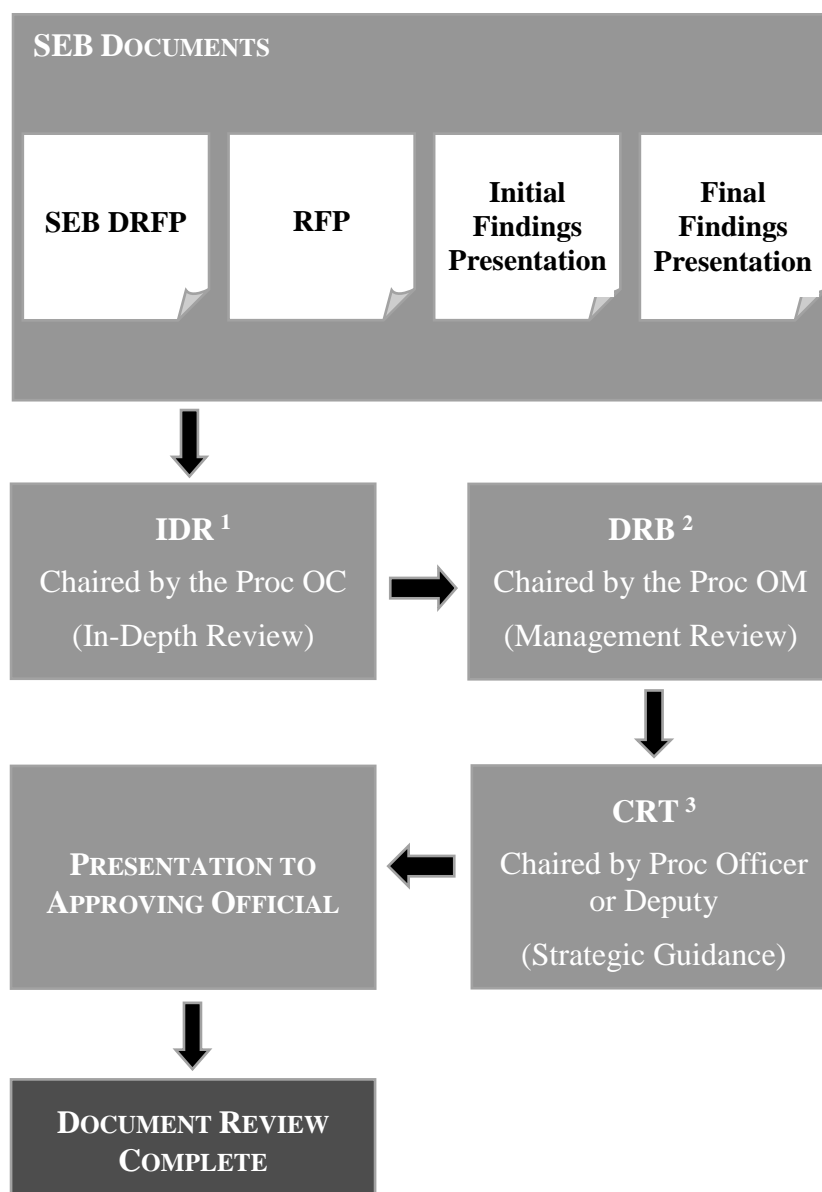
<sup>1</sup> Meeting attendees listed at 5.9.2

<sup>2</sup> Meeting attendees listed at 5.9.3

<sup>3</sup> Meeting attendees listed at 5.9.4

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### E.3 SEB Document Review Flow-Chart



<sup>1</sup> Meeting attendees listed at 5.9.2

<sup>2</sup> Meeting attendees listed at 5.9.3

<sup>3</sup> Meeting attendees listed at 5.9.5

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#### E.4 Competitive Acquisition Review Procedures and Expectations

Process	Description	Expectations
<b>IDR</b>	<b>Comprehensive Document Review</b>	<b>Documents having successfully completed an IDR will:</b> <ul style="list-style-type: none"> <li>• Be grammatically correct and without spelling errors.</li> <li>• Be well-formatted using consistent and appropriate headers and footers, including page numbers.</li> <li>• Be well-researched and contain information of the highest quality.</li> <li>• Be well-organized in a logical manner and clearly communicate the instructions, information, or conclusions.</li> <li>• Represent a finished product which requires no substantive corrections.</li> </ul>
↓		
<b>DRB</b>	<b>Management Review</b>	<b>Documents having successfully completed a DRB will:</b> <ul style="list-style-type: none"> <li>• Benefit from a fresh set of eyes which may reveal overlooked errors or other weaknesses with the documents.</li> <li>• Benefit from inputs of the more experienced reviewers on the subject matter of the documents.</li> <li>• Represent high fidelity documents ready for presentation.</li> </ul>
↓		
<b>CRT</b>	<b>Insight and Strategic Guidance</b>	Documents at CRT will be complete/ready for release with the intention that Center-level advisors can simply concur or redirect the RDT or SEB based on the content with no concern for the document's format or quality.
↓		
<b>Approving Official</b>	<b>Final Approval of Document</b>	Documents which have been approved indicates that either they are complete/ready for release or that the RDT or SEB may proceed with the next scheduled action.

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## APPENDIX F - DOCUMENT REVIEW

### F.1 PSM Briefing Charts Review

#### F.1.1 **IDR**

F.1.1.1 Does the information in the briefing charts comply with the acquisition plan requirements specified at FAR 7.105 and NFS 1807.105?

F.1.1.2 Was the approved procurement template followed? Generally, if supplemental information is required it should be placed in the backup briefing charts. Deviations from the templates should be coordinated with the SSO Advisor and approved by the Proc OC. Backup briefing charts should also be reviewed.

F.1.1.3 Is the document grammatically correct and free of spelling errors?

F.1.1.4 Have all attachments, references, or links been crosschecked to ensure alignment, consistency, and accuracy?

F.1.1.5 Was adequate rationale provided for key issues (e.g., proposed contract type, contract term if greater than five years, intellectual property, and OCIs)? For example, if an award fee incentive is proposed, is sufficient rationale included to justify its use (in accordance with NFS 1816.405-2, to include a discussion of the other types of contracts considered, indicating why an award fee incentive is the appropriate choice)?

F.1.1.6 If an incentive arrangement is proposed, does the strategy sufficiently describe the arrangement so that its implementation and impact are fully understood?

F.1.1.7 If the Req Org's preliminary estimate for the scope of work exceeds the anticipated budget over the life of the contract, does the strategy adequately address risk mitigation or discuss the potential for reduced scope?

F.1.1.8 Are any necessary deviations described, to include supporting rationale? For example, if the proposed contract term exceeds five years, does the acquisition strategy effectively explain the need for the deviation?

F.1.1.9 Were applicable risks and associated mitigation strategies addressed for all acquisition phases?

F.1.1.10 If the proposed contract contains an IDIQ provision, does the strategy adequately identify how much of the contract value is IDIQ? Does it identify the sections of the PWS that will utilize IDIQ?

F.1.1.11 If award is anticipated to a single source with an IDIQ value over the FAR 16.504 threshold that requires HQ approval, does the acquisition strategy provide adequate justification to support an award of this nature?

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F.1.1.12 Do the briefing charts accurately address each of the NASA Procurement Tenets?

F.1.1.13 Has each IDR member ensured applicable regulatory compliance specific to their areas of expertise and provided comments as necessary?

F.1.1.14 Are IDR comments provided of sufficient clarity to allow appropriate RDT disposition?

## F.1.2 DRB

F.1.2.1 Have each of the items in the IDR “PSM Briefing Charts Review” been adequately addressed?

F.1.2.2 Has the SEB major milestone schedule been reviewed and is it considered appropriate?

F.1.2.3 Have any open IDR comments been considered, has adequate information been provided in response to these comments, and are DRB members prepared to discuss these open items?

F.1.2.4 Has each DRB member ensured applicable regulatory compliance specific to their areas of expertise and provided comments as necessary?

F.1.2.5 Are DRB comments provided of sufficient clarity to allow appropriate RDT disposition?

## F.1.3 PSM

F.1.3.1 Has the SEB major milestone schedule been reviewed and is it considered appropriate?

F.1.3.2 Have any open DRB comments been considered, has adequate information been provided in response to these comments, and are PSM members prepared to discuss these open items?

F.1.3.3 Does the proposed acquisition plan align with Center goals, objectives, strategies, and budgetary constraints?



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## F.2 Solicitation Review

### F.2.1 **IDR**

F.2.1.1 Is the solicitation complete and clear, consistent with Agency objectives and with the needs of the requiring organization, and in accordance with the approved PSM?

F.2.1.2 Has the solicitation captured the anticipated contract structure (e.g., mission services versus IDIQ clauses/provisions, fixed price versus cost reimbursement)?

F.2.1.3 Is the document based on the latest guidance and regulatory issuances?

F.2.1.4 Is the document written in one voice (i.e., ensure the document is not written in passive voice)?

F.2.1.5 Is the document written in an active voice (e.g., does the PWS, PRS, and background and historical section, which are often written by multiple authors, read the same across all sections)?

F.2.1.6 Is the document logically organized and does it clearly communicate offeror instructions and other pertinent information?

F.2.1.7 Is the document grammatically correct and free of spelling errors?

F.2.1.8 Is the document properly formatted using consistent and appropriate headers, footers, font type and size, and page numbers?

F.2.1.9 Are all model contract and offeror's representations and certifications documents that contain filled-in's to be returned by offerors consistent with solicitation completion instructions (e.g., CLIN values, IDIQ Rates, Job Description/Qualification forms)?

F.2.1.10 Have all attachments, references (e.g., PWS references to Data Requirement Descriptions (DRDs)), and links been crosschecked to ensure alignment, consistency, and accuracy?

F.2.1.11 Has the use of "etc." and "as required" been limited to situations where it is purposeful/acceptable for the contractor to make the determination (e.g., in PWS references or DRDs)?

F.2.1.12 Are the criteria for evaluation and selection clearly described?

F.2.1.13 Is the requested data aligned with evaluation criteria?

F.2.1.14 Has the Proc Spec/Proc Mbr verified FAR and NFS clause/provision applicability and currency (to include adequate sub-citations of appropriate lettering/numbering)? Have the

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appropriate MSFC clauses been included? Have the clause/provision titles been added to all referenced numbers?

F.2.1.15 Are proposal due dates specified in only one area of the solicitation?

F.2.1.16 Have duplicate clauses and provisions been eliminated throughout the solicitation?

F.2.1.17 Does the PWS enable offerors to:

- a. Clearly understand the Government's requirements?
- b. Accurately cost/price their offer and submit high quality technical offers?

F.2.1.18 Is the PWS consistent between sections? For example, if the 1st level PWS (e.g., 3.0) is intended to be an introduction with no required staffing, then avoid having effort elsewhere that requires staffing at the 1st level (e.g., 4.0).

F.2.1.19 Does the PWS clearly state the requirements in terms of performance based contracting, where the products to be delivered or services to be provided do not direct how the work is to be performed?

F.2.1.20 Does the PWS clearly indicate the expected outcomes or outputs so that contractor performance can be measured against the performance standards specified?

F.2.1.21 If award fee is to be used, do the clauses and PEP (i.e., award fee plan) in Section J comply with the guidance in NFS 1816.405-2 regarding cost-plus-award-fee contracts and the NASA Award Fee Contracting Guide?

F.2.1.22 Have unnecessary DRDs been eliminated?

F.2.1.23 Do the titles and numbers of the DRDs match the particular procurement?

F.2.1.24 Does the solicitation clearly identify any DRDs that are to be submitted at the time of proposal submission?

- a. Does the language in Section L unnecessarily restate the contents of the DRDs?
- b. Does Section M include language to evaluate DRD submissions?

F.2.1.25 If the contract is a recompetition, were the discriminators from the previous competition considered in formulation of subfactors?

F.2.1.26 Does Section L "map" to Section M (i.e., is there a correlation between what is being requested and how it will be evaluated)?

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F.2.1.27 Do cost or pricing instructions clearly explain how offerors should prepare the pricing or cost sections of their offers and are they consistent with the selected contract type?

F.2.1.28 Does the solicitation capture any updates (e.g., new wage determinations, escalation rates, or clause revisions) between DRFP and RFP, or initial and final offers (when applicable)?

F.2.1.29 Have industry questions been fully addressed? Do the answers avoid patronizing or condescending tones?

F.2.1.30 Has each IDR member ensured applicable regulatory compliance specific to their areas of expertise and provided comments as necessary?

F.2.1.31 Are comments provided of sufficient clarity to allow appropriate RDT or SEB disposition?

## F.2.2 DRB

F.2.2.1 Have each of the items in the IDR “Solicitation Review” been adequately addressed?

F.2.2.2 Have any open IDR comments been considered, has adequate information been provided in response to these comments, and are DRB members prepared to discuss these open items?

F.2.2.3 Does Section L describe appropriate evaluation subfactors that will provide meaningful discriminators?

F.2.2.4 Has each DRB member ensured applicable regulatory compliance specific to their areas of expertise and provided comments as necessary?

F.2.2.5 Are comments provided of sufficient clarity to allow appropriate RDT or SEB disposition?

## F.2.3 CRT

F.2.3.1 Have any open DRB comments been considered, has adequate information been provided in response to these comments, and are CRT members prepared to discuss these open items?

F.2.3.2 Does the proposed solicitation align with NASA and MSFC goals, objectives, strategies, and budgetary constraints?

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### F.3 Initial Findings Presentation and Final Findings Presentation Review

#### F.3.1 **IDR**

F.3.1.1 Are the findings written in accordance with the training on how to write findings provided by SSO?

F.3.1.2 Are the findings consistently formatted, grammatically correct, and free of spelling errors?

F.3.1.3 Do findings contain the appropriate volume, proposal section, and page number where the approach was described?

F.3.1.4 Do the findings makes sense to a person who has not read the solicitation or applicable proposal?

F.3.1.5 Has the team deviated from the standard presentation charts? If so, was adequate explanation provided?

F.3.1.6 Do the titles used on the presentation charts map back to the titles in the findings report, if utilized, and do the titles convey the appropriate level of detail (i.e., sufficient information as to be self-explanatory)?

F.3.1.7 Are findings consistent across proposals? (e.g., are similar strengths and weaknesses treated in a like manner, displaying that proposals were evaluated consistently?)

F.3.1.8 Do the findings submitted by Evaluators (e.g., SMA, Industrial Labor Relations, Property, Cost/Price, and SBS) reflect the collective judgment of the SEB and relate to the evaluation criteria identified in Section M of the RFP?

F.3.1.9 Do the findings reflect an accurate assessment of the offeror's proposal as it relates to the evaluation criteria identified in Section M of the solicitation?

F.3.1.10 Do the adjectival ratings for each specific subfactor fit the definitions referenced in the solicitation? (e.g., where a subfactor has a significant weakness, it cannot be given an adjectival rating of "Excellent," and without a significant weakness, a subfactor cannot be given an adjectival rating of "Poor.")

F.3.1.11 Is the confidence level established for Past Performance representative of the summation of all individual past performance reference findings?

F.3.1.12 For cost-type contracts, is there clear traceability between the finding and the probable cost adjustment (e.g., resource impacts due to cost realism)?

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F.3.1.13 Is additional cost/price information necessary? Generally, if additional cost/price information is considered necessary outside what is required in the templates, the information should be placed in the back-up charts.

F.3.1.14 Do the sums on presentation charts add correctly? (visually check for rounding errors both vertically and horizontally, and either correct by inserting hard numbers that add up or insert a rationale statement to explain any rounding discrepancies when inserting hard numbers risks skewing the data)

F.3.1.15 Are the established Mission Suitability scores and past performance confidence levels consistent with the findings identified by the SEB?

F.3.1.16 Is the convention used to identify changes between initial and final findings clearly marked with a legend? Is there clear traceability between the initial and final finding?

F.3.1.17 If an initial finding was deleted as a result of discussions/FPRs (e.g., elimination of a weakness) does the SEB include rationale as to why it was deleted?

F.3.1.18 If a deleted weakness had multiple “aspects” (e.g., it was a significant weakness with multiple line items), does the SEB disposition of all aspects with sufficient rationale?

F.3.1.19 Has each IDR member reviewed findings specific to their areas of expertise, considered findings as a whole, and provided comments as necessary?

F.3.1.20 Are comments provided of sufficient clarity to allow appropriate SEB disposition?

## F.3.2 DRB

F.3.2.1 Have each of the items in the IDR “Initial Findings Presentation and Final Findings Presentation Review” been adequately addressed?

F.3.2.2 Have any open IDR comments been considered, has adequate information been provided in response to these comments, and are DRB members prepared to discuss these open items?

F.3.2.3 Are findings consistent across proposals? (e.g., are similar strengths and weaknesses treated in a like manner, displaying that proposals were evaluated consistently?)

F.3.2.4 Is the evaluation consistent across proposals and do the findings trace back to the criteria identified in Section M?

F.3.2.5 Is the confidence level established for past performance representative of the summation evaluation of all individual past performance reference findings?

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F.3.2.6 Are the established Mission Suitability scores and past performance confidence levels consistent with the findings identified by the SEB?

F.3.2.7 Is there clear traceability between the initial and final finding?

F.3.2.8 Has each DRB member reviewed findings specific to their areas of expertise, considered findings as a whole, and provided comments as necessary?

F.3.2.9 Are comments provided of sufficient clarity to allow appropriate SEB disposition?

### F.3.3 CRT

F.3.3.1 Have any open DRB comments been considered, has adequate information been provided in response to these comments, and are CRT members prepared to discuss these open items?

F.3.3.2 Is the evaluation consistent across proposals and do the findings trace back to the criteria identified in Section M?

F.3.3.3 Are the established Mission Suitability scores and past performance confidence levels consistent with the findings identified by the SEB?

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## APPENDIX G - REFERENCES

G.1 [NASA Award Fee Contracting Guide](#)

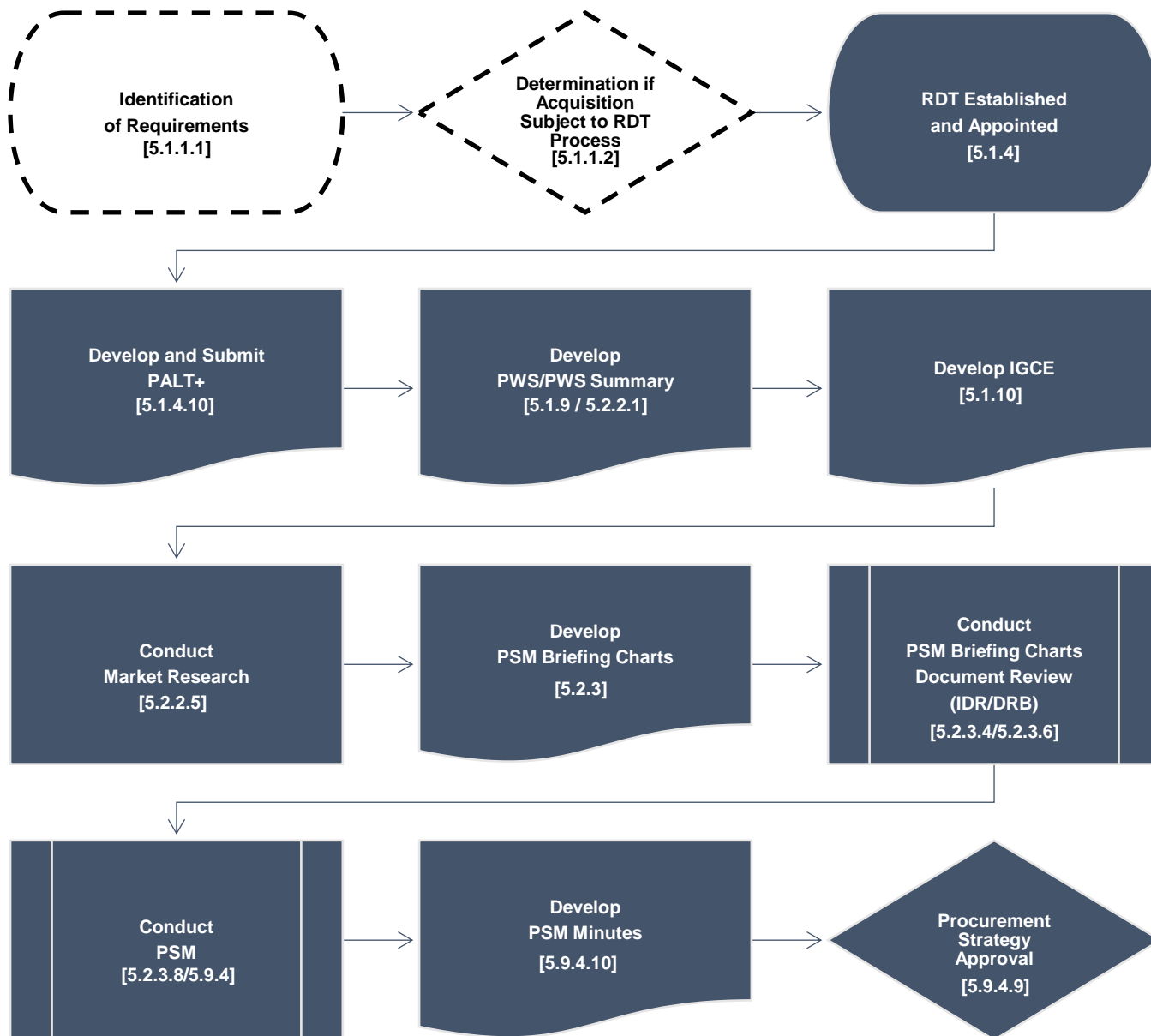
G.2 [NASA Procurement Tenets](#)

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## APPENDIX H - MWI PROCESS FLOW CHARTS

### H.1 RDT Process Flow Charts

#### Acquisition Strategy Process

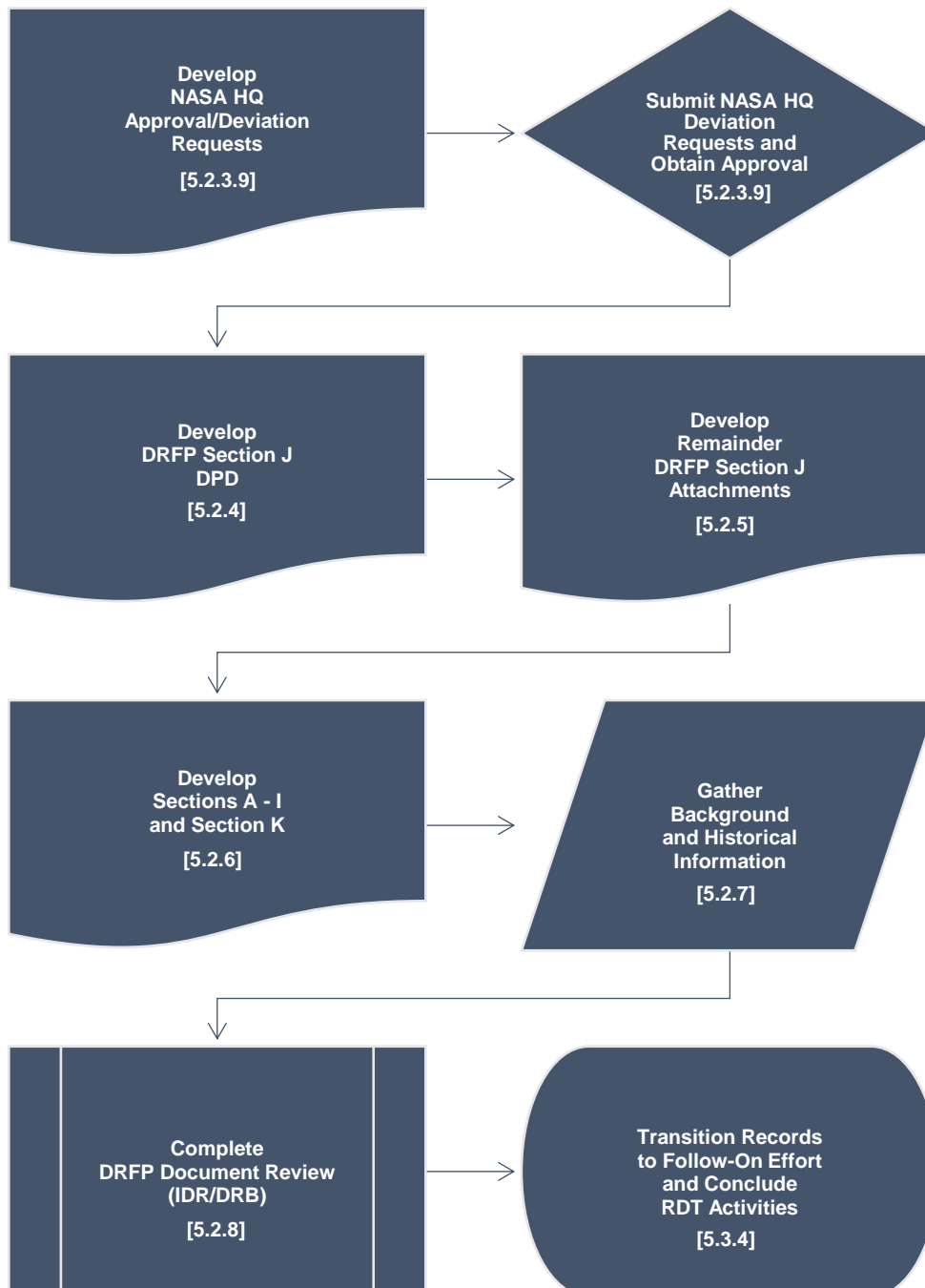




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## RDT Process Flow Charts (continued)

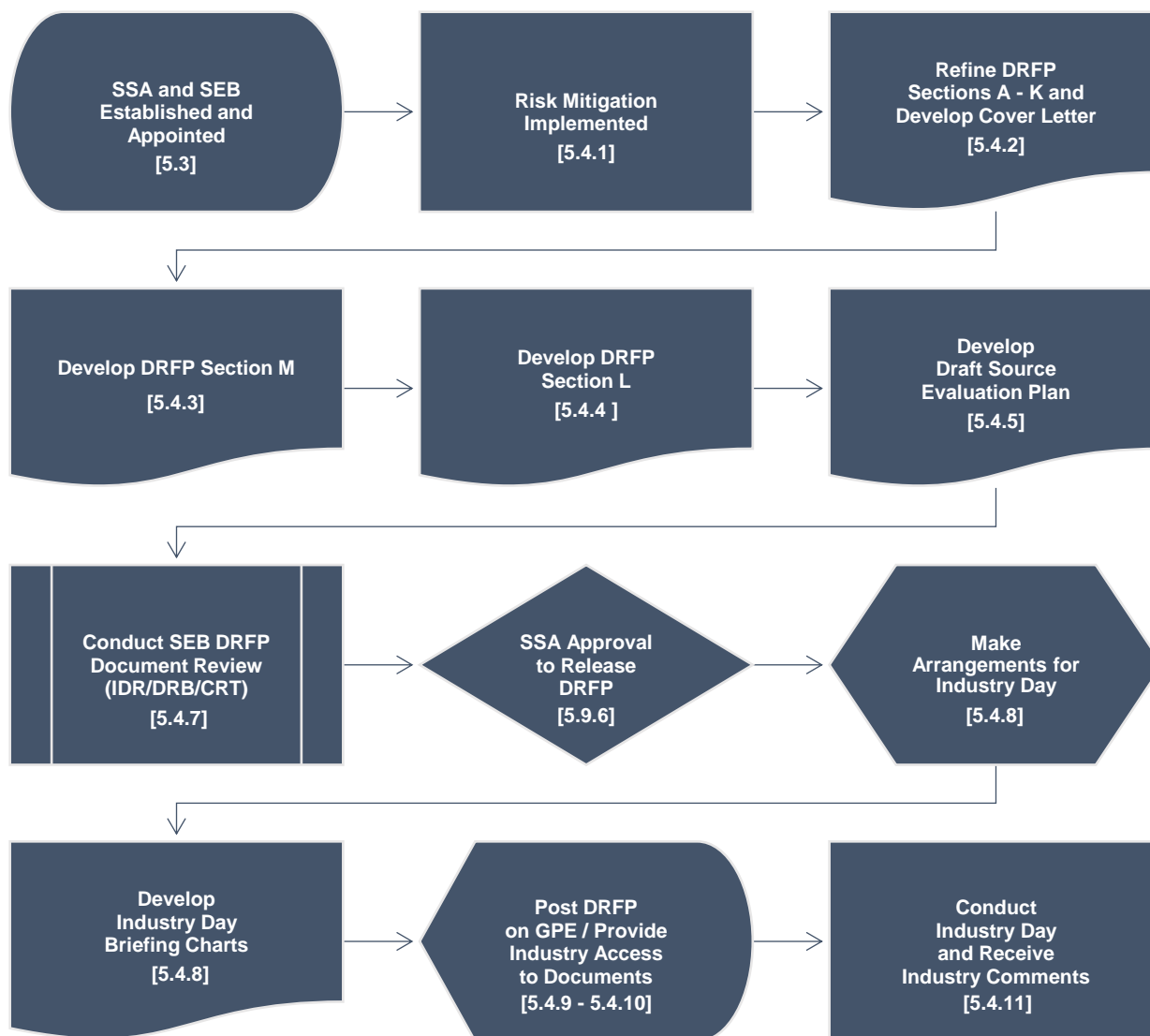
### DRFP Development Process



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## H.2 SEB Process Flow Charts

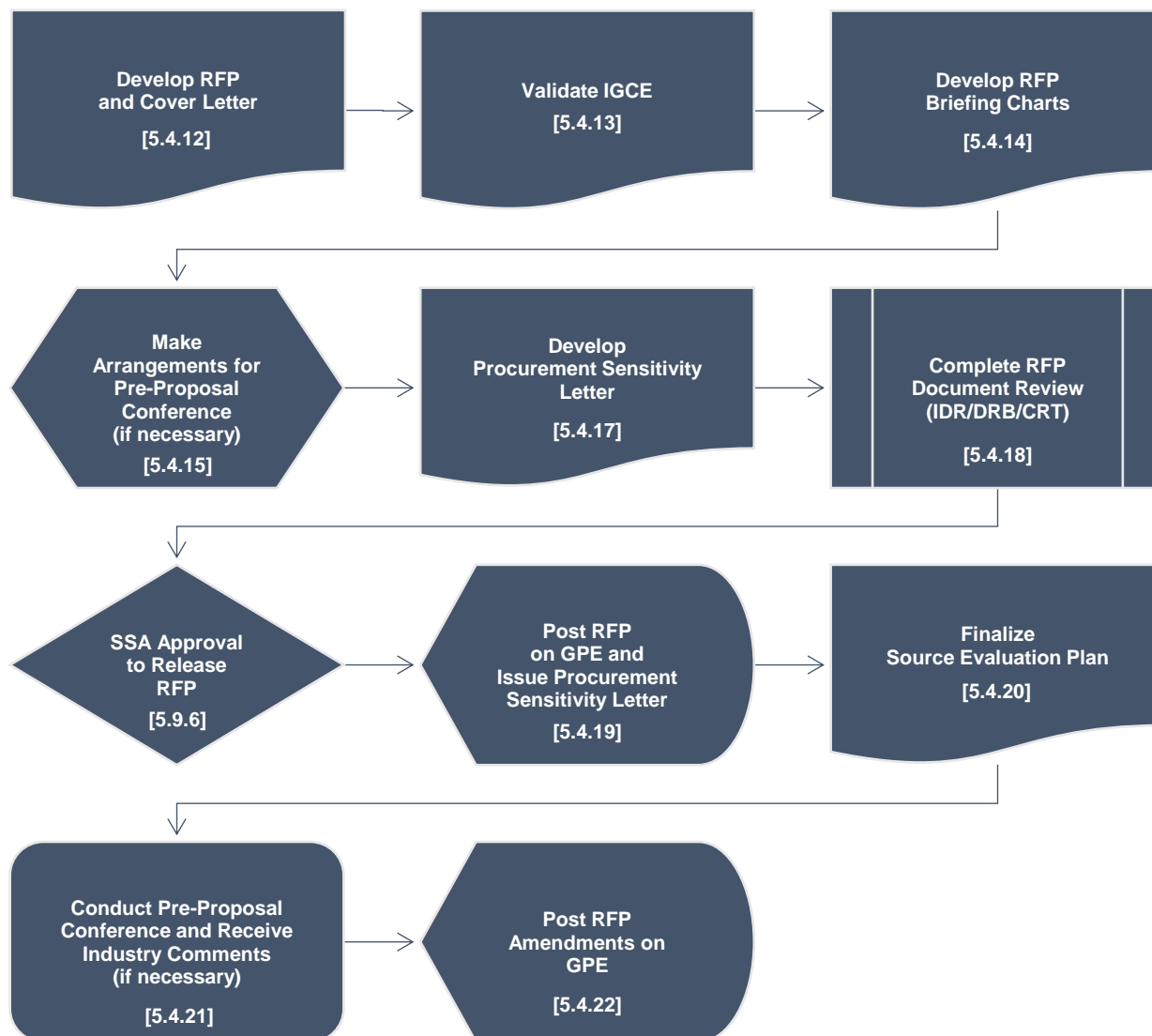
### Solicitation (DRFP) Process



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## SEB Process Flow Charts (continued)

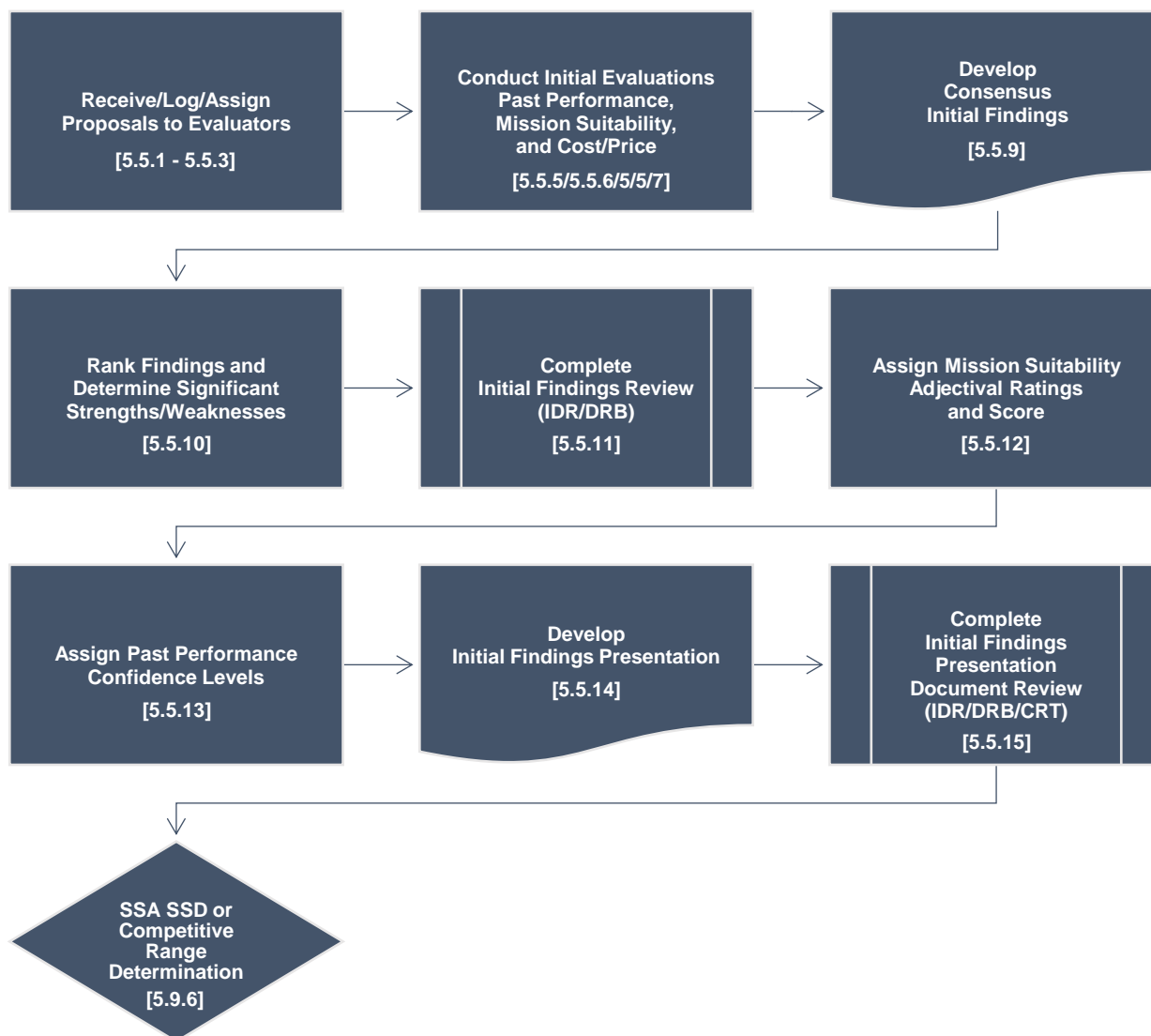
### Solicitation (RFP) Process



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## SEB Process Flow Charts (continued)

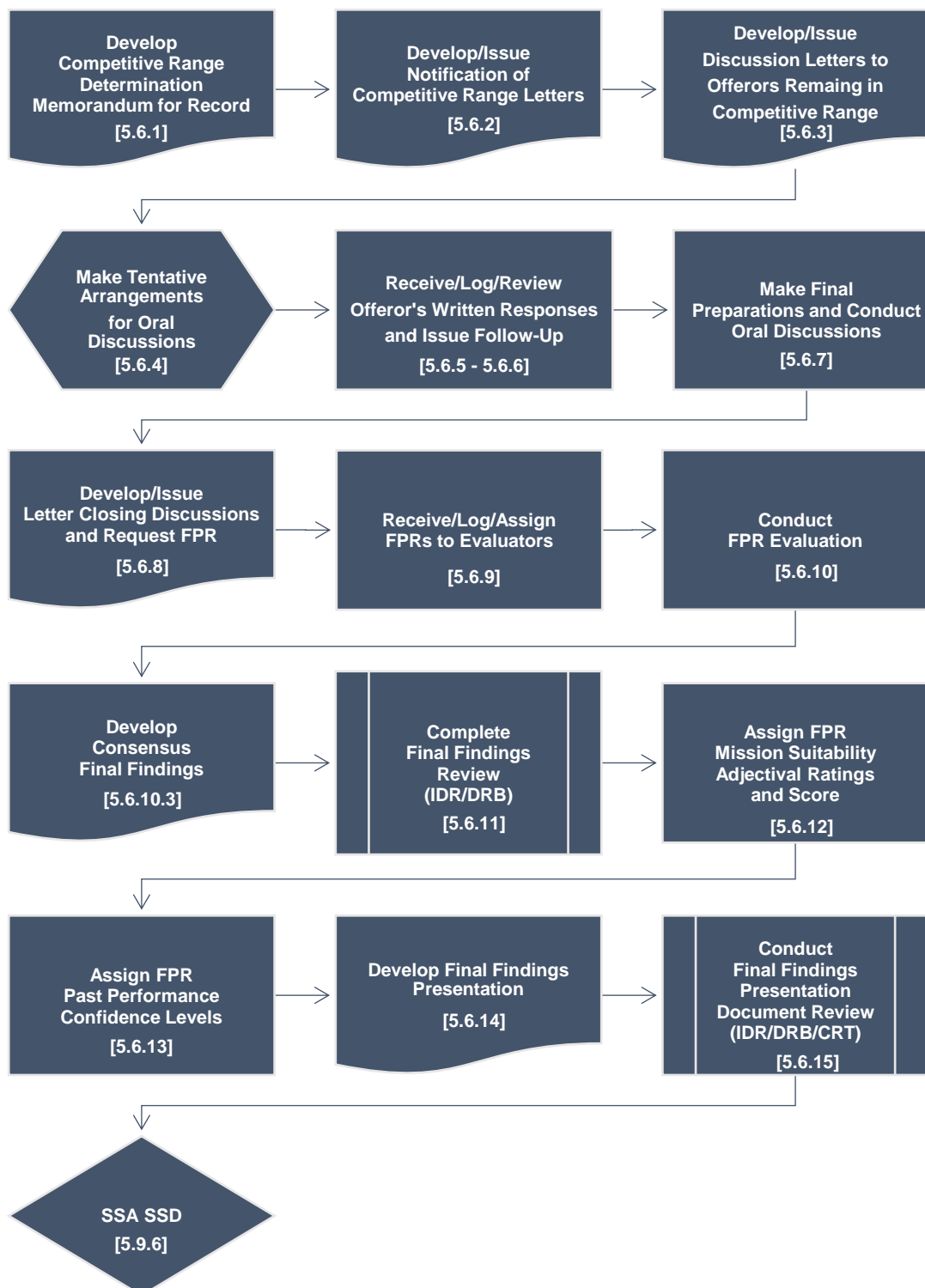
### Initial Evaluation Process



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## SEB Process Flow Charts (continued)

### Competitive Range, Discussions, and Final Proposal Evaluation Process



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## SEB Process Flow Charts (continued)

### Source Selection, Notification, and Contract Award

